Theme: Exploring College

Explore College Options Related to Interests
Research College Options
Visit a College

Theme: Building a College Success Network

Learn About Networks and Their Value
Build Your Own Network
Utilize Network to Expand Resources and Opportunities

Theme: Path to College

My Graduation Plan
College Admission Plan

Theme: Community Service & Extracurricular Activities

Document Community Service Hours & Extracurricular Activities

Theme: Financial Aid Literacy

Understanding Financial Aid Options Available
Understand and Successfully Complete FAFSA and Other Financial Aid Applications
Interpret and Plan from Financial Aid Package/Award Letter
Theme:
Exploring College
Explore College Options Related to Interests
Purpose

This activity is designed to help students start thinking about how they will feel successful in life and why this important to them. It’s a lead-in to thinking about and understanding what educational steps will be necessary to fulfill their goals.

Suggested Grade Level:

9

Materials and Handouts

Worksheet: What I Want for My Future

Approximate Time Needed:

50 minutes

Student-Facing Instructions

Part 1:
Each of the goals in the worksheet is something that people might want. Read each one. Is this something you want someday? Next, decide which of them you want the most. You can add your own as well.

Part 2:
Next, now that you’ve decided what you want most in life, follow the example to complete the prompts about what will make you feel successful and why these things are important to you.

Part 3:
Now use your responses to the prompts to write a reflective paragraph, using a topic sentence, complete sentences, transitions and a concluding sentence.

Formative Assessment

Growth/Personal reflective paragraph aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

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Teacher Resource

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions
Instructions

Part 1:
Each of the goals in the worksheet is something that people might want. Read each one. Is this something you want someday? Next, decide which of them you want the most. You can add your own as well.

Part 2:
Next, now that you’ve decided what you want most in life, follow the example to complete the prompts about what will make you feel successful and why these things are important to you.

Part 3:
Now use your responses to the prompts to write a reflective paragraph, using a topic sentence, complete sentences, transitions and a concluding sentence.
Worksheet: What I Want for My Future

Student Name: ________________________________ Date: ____________

Directions: Each of these goals is something that people might want. Read each one. Is this something you want someday?

Next, decide which of them you want the most. That is #1. Write that goal next to #1. Write the rest of the goals in order of how much you want them, with #10 being what you don’t care very much about.

If you want something that is not on this list, write it down by the number that shows how much you want it.

<table>
<thead>
<tr>
<th>Make a lot of money</th>
<th>Graduate from college</th>
<th>Own a big fancy house</th>
<th>Be famous</th>
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</thead>
<tbody>
<tr>
<td>Get married and raise a family</td>
<td>Be the boss or the most powerful person at my work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Find the right person to live with for the rest of my life</td>
<td>Have an expensive car</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Do something that helps a lot of people, like find a cure for cancer or solve global warming</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have a job I really love</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#1: ____________________________________________

#2: ____________________________________________

#3: ____________________________________________

#4: ____________________________________________

#5: ____________________________________________

#6: ____________________________________________

#7: ____________________________________________
Writing about Success

Now that you have thought about the things you want most in your life, complete the prompts below. For each prompt, write at least two complete sentences. For example, if your #1 goal is to become a famous chef, which is not on this list, your reflection could sound like this:

I think my life will be a success if I can become a chef in my own restaurant. To me, this is important because I love to cook and I make up new recipes all the time. My whole family loves to cook. Some of our favorite recipes have been passed down for four generations. Cooking is a really important part of my life and it would make me happy to cook as a profession.

This is the first entry in your portfolio, so take your time and think about what you want to say.

1. I think my life will be a success if I can…

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

To me, this is important because…

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

2. Success in my life will also mean that I…

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

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That is important to me because…

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

3. Finally, I will be successful if I…

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

That is important to me because…

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

Before handing in your assignment, check to make sure it meets or exceeds the following assessment criteria:

– The reflection is composed of at least six complete sentences.
– The reflection uses the prompts to help explain what success means to the student.
– The reflection is clear and thoughtful.
– The reflection is neat and uses proper spelling and grammar.
### My Life So Far

#### Purpose
This activity is designed to help students think reflectively about where they’ve been and what they’ve experienced before they plan for their future.

#### Suggested Grade Level:
9

#### Materials and Handouts
Worksheet: My Life So Far

#### Approximate Time Needed:
50 minutes

#### Student-Facing Instructions
Before you can plan for the future, it’s important to reflect on where you’ve been and what you’ve experienced. You are going to create a timeline or visual representation of the important events in your life up to this point, so you can “see” how far you have come.

You will be creating your visual representations in the next class period. First, answer the questions below to help you start thinking about the important events in your life.

#### Formative Assessment
Visual aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Presents perspective with supportive evidence
- Uses digital media/visual displays to engage and support audience understanding

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Before you can plan for the future, it’s important to reflect on where you’ve been and what you’ve experienced. You are going to create a timeline or visual representation of the important events in your life up to this point, so you can “see” how far you have come.

You will be creating your visual representations in the next class period. First, answer the questions below to help you start thinking about the important events in your life.
Assignment: My Life So Far

Directions: Before you can plan for the future, it’s important to reflect on where you’ve been and what you’ve experienced. You are going to create a timeline or visual representation of the important events in your life up to this point, so you can “see” how far you have come.

You will be creating your visual representations in the next class period. First, answer the questions below to help you start thinking about the important events in your life.

Questions to Think About

Answer these questions in your notebook for homework:

– Describe your earliest memory.
– Describe a time when you overcame a challenge, either at school or in your personal life.
– Explain something that you are proud of and why.
– What words come to mind when you think about your life right now? Write down at least three ways to describe yourself or your life.

You may use family photographs or other artifacts in your visual representation—as long as they are photos that your family doesn’t mind sharing. As you write the answers to these questions, think about what photos or images you might be able to use to represent the times you’re writing about. If you want to include photos, leave space for them in your visual and put them in when you get home tonight. You need to have your visual finished before class starts tomorrow. Remember: This is an opportunity to practice your planning skills!

Notes and Visual of My Life So Far

Once you have answered your questions, you will use those answers to guide you as you put together your visual representation. On the next page, you will see an example of one student’s answers and her visual representation.
Elena Pangilinan - My Life So Far Questions

#1 - My earliest memory is lying on the floor with my dog, watching TV.

#2 - Math is hard for me. I nearly failed math in 5th grade. Then I got tested and it turns out I have a learning disability for math. I took special classes and they helped me understand it. I also work really hard at it. Now I am passing math.

#3 - I am proud of making the volleyball team. I used to be really bad at it so I practiced all the time. Now my serve is excellent. Maybe I'll apply for a volleyball scholarship for college.

#4 - Words that describe my life right now: Big sister to Claudia, my little sister who is five. Best friend to Staci. Study hard in high school. Love volleyball.

My Life is Like a:

[Diagram of a flower with petals labeled: Little sister Claudia, 5th grade math blues, best friends, volleyball most improved player, study hard in high school]

Ideas for Designs

In this section are some other ideas for ways to depict the important times and achievements in your life. Think about which one symbolizes your life so far. You don't have to use one of these; they are just to get your imagination going.
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Before handing in your assignment, check to make sure it meets or exceeds the following assessment criteria:

– The visual representation depicts key life experiences and events.
– The visual representation illustrates important information from the student’s notes.
– The visual representation is presented in the form of a timeline or other symbolic depiction.
– The visual representation is neat, legible, and presentable.
### My Classmate’s Life So Far Interview

**Purpose**

This activity gives students a chance to share their own important life experiences, practice listening skills, and learn about their classmates.

**Suggested Grade Level:**

9

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**Materials and Handouts**

Worksheet: My Classmate’s Life So Far Interview

**Approximate Time Needed:**

20 minutes

---

**Student-Facing Instructions**

Now that you have created your visual representation, you are going to interview a classmate about his or her visual representation and write a paragraph describing what your classmate shared with you.

---

**Teacher Notes**

This lesson follows the lesson titled “My Life So Far”.

---

**Assessment**

Completion of worksheet and interview write-up

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Instructions

Now that you have created your visual representation, you are going to interview a classmate about his or her visual representation and write a paragraph describing what your classmate shared with you.
Assignment: My Classmate’s Life So Far Interview

Directions: Now that you have created your visual representation, you are going to interview a classmate about his or her visual.

The Interview

Tips for Interviewing

Look at the visual, but also look at your partner. Pay attention to how your partner looks and sounds—happy? Sad? That can tell you a lot about the events and topics described in the visual.

Listen carefully. That means don’t talk when your partner is talking and pay attention to what your partner has to say.

Take notes, but don’t try to write down every word your partner says.

Ask questions if you don’t understand. Wait until your partner finishes a sentence. Then ask for an explanation.

Check the important points with your partner. Repeat back what you think your partner said in your own words. For example, “It sounds like volleyball is a really important part of your life.” That allows your partner to correct you if you got distracted or wrote something down incorrectly.
Writing Up the Interview

Once you have completed your interview, write a short summary of what you learned about your classmate. Your summary should be at least five sentences long. You should cover all the important points you learned about your partner’s life. The first sentence should talk about the most important thing you learned about your partner, and the sentences should go in order from most important information to least important. An example is provided.

Here is what Elena’s partner, Martin, wrote in his summary:

Elena is really good at volleyball now, but it took her a lot of hard work.
Now she’s so good she might get a college scholarship for playing volleyball.
Elena works very hard in school and got a “B” average last year.
In 5th grade, she found out she had a learning disability, but she studies with her mom and that helps.
Elena is proud that she gets along with her little sister, Claudia, even though she has to babysit her sister a lot.
Elena’s earliest memory is watching TV when she was three years old.

Before handing in your assignment, check to make sure it meets or exceeds the following assessment criteria:

- The interview write-up is at least five sentences long.
- The interview write-up accurately reflects the interviewee’s visual representation.
- The interview write-up demonstrates the interviewer’s ability to listen carefully by presenting ideas or details not found in the interviewee’s visual representation or homework responses.
- The interview write-up is neat and uses proper spelling and grammar.
Planning My Time Effectively

Purpose
This activity gets students to reflect on different prioritizing styles and how this planning behavior can connect to what they want for their future.

Suggested Grade Level:
9

Materials and Handouts
Planning My Time Effectively Worksheet
Planning My Time Effectively Reading

Approximate Time Needed:
50 minutes

Student-Facing Instructions

Part 1:
Complete the reading and learn ways to effectively plan your time.

Part 2:
Based on what you have read, answer the questions in the worksheet.

Part 3:
Write a reflective paragraph in which you describe the pros and cons of the ways you handle your responsibilities. In thinking about your long-term goals (the things that will make you feel successful from the lesson: “What I Want For My Future”), what are you doing well that you want to make sure you keep doing? What changes could you make in how you prioritize your responsibilities?

Teacher Notes
This lesson follows the lesson titled, “What I Want for My Future”.

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Teacher Resource

**Formative Assessment**

Growth/Personal reflective paragraph aligned to quality criteria:

Student Learning Outcomes assessed in this task:

- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth

Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

- Optional Student Learning Outcomes:
  - Skillfully uses written language to convey ideas and understanding
  - Demonstrates command of standard English conventions
Instructions

Part 1:
Complete the reading and learn ways to effectively plan your time.

Part 2:
Based on what you have read, answer the questions in the worksheet.

Part 3:
Write a reflective paragraph in which you describe the pros and cons of the ways you handle your responsibilities. In thinking about your long-term goals (the things that will make you feel successful from the lesson: “What I Want For My Future”), what are you doing well that you want to make sure you keep doing? What changes could you make in how you prioritize your responsibilities?
Reading: Planning My Time Effectively

CHARACTERS

Narrator
Ashanti
Cara
Xavier
Miguel

NARRATOR: Ashanti, Cara, Xavier, and Miguel have very different ways of balancing their schoolwork and social lives. In fact, the friends realize just how different their priorities are during a discussion one Monday at lunch.

CARA: (Asks Ashanti) How far have you gotten with your book report for English?
ASHANTI: I haven’t started it yet.
CARA: What? It’s due tomorrow!
ASHANTI: I must work better under pressure. I always wait until the last minute. I’ll probably have to pull an all-nighter tonight.
CARA: I hear you. I really wanted to start this report last weekend, but Susana talked me into going shopping with her. Plus, things are so messed up at Kevin’s house—he’s needed so much attention lately.
XAVIER: Who’s Kevin?
CARA: My boyfriend. You know that Xavier.
XAVIER: (Slapping the side of his head) Whoa! I just remembered that I have a quiz next period! I meant to study last night, but…. 
MIGUEL: This sounds familiar.
XAVIER: Seriously, I was just going to watch one show and relax a little, but then I watched another, and then another, and I ended up falling asleep with the TV on.
MIGUEL: All this talk is reminding me of the science test this week. I almost forgot to put it in my planner. You guys do remember that we have a science test on Wednesday, right?
(The other three students look at each other and shrug.)
ASHANTI: What’s a planner?
Priorities: Putting First Things First

The students you have just read about represent different ways of managing responsibilities. Author Sean Covey describes them in his book The 7 Habits of Highly Effective Teens. The following table summarizes four main ways of handling priorities:

<table>
<thead>
<tr>
<th>1. THE PROCRASTINATOR</th>
<th>2. THE PRIORITIZER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exam is tomorrow</td>
<td>Essay is due in a week</td>
</tr>
<tr>
<td>Late for school</td>
<td>Time in schedule for friends, exercise, etc.</td>
</tr>
<tr>
<td>Project due today</td>
<td>Relaxes after work is done</td>
</tr>
</tbody>
</table>

Bottom line: Puts off things to do until they become a crisis.  Bottom line: Looks at everything there is to do and then prioritizes first things first and last things last.

<table>
<thead>
<tr>
<th>3. THE YES-MAN</th>
<th>4. THE SLACKER</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unimportant phone calls</td>
<td>Too much TV</td>
</tr>
<tr>
<td>Other people’s problems</td>
<td>Excessive video games</td>
</tr>
<tr>
<td>Peer pressure</td>
<td>Endless texting or phone calls</td>
</tr>
</tbody>
</table>

Bottom line: Spends so much time pleasing others that things to do fall to the bottom of the list. Bottom line: Wastes time and doesn’t take responsibility for things that need to get done.
Worksheet: What I Want for My Future

Student Name: __________________________ Date: __________

Directions: Each of these goals is something that people might want. Read each one. Is this something you want someday?

Next, decide which of them you want the most. That is #1. Write that goal next to #1. Write the rest of the goals in order of how much you want them, with #10 being what you don’t care very much about.

If you want something that is not on this list, write it down by the number that shows how much you want it.

<table>
<thead>
<tr>
<th>Make a lot of money</th>
<th>Graduate from college</th>
<th>Own a big fancy house</th>
<th>Be famous</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get married and raise a family</td>
<td>Be the boss or the most powerful person at my work</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Find the right person to live with for the rest of my life</td>
<td>Have an expensive car</td>
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<tr>
<td>Do something that helps a lot of people, like find a cure for cancer or solve global warming</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Have a job I really love</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#1: ___________________________________

#2: ___________________________________

#3: ___________________________________

#4: ___________________________________

#5: ___________________________________

#6: ___________________________________

#7: ___________________________________
### Writing about Success

Now that you have thought about the things you want most in your life, complete the prompts below. For each prompt, write at least two complete sentences. For example, if your #1 goal is to become a famous chef, which is not on this list, your reflection could sound like this:

I think my life will be a success if I can become a chef in my own restaurant. To me, this is important because I love to cook and I make up new recipes all the time. My whole family loves to cook. Some of our favorite recipes have been passed down for four generations. Cooking is a really important part of my life and it would make me happy to cook as a profession.

This is the first entry in your portfolio, so take your time and think about what you want to say.

1. I think my life will be a success if I can…

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

To me, this is important because…

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________

2. Success in my life will also mean that I…

   __________________________________________
   __________________________________________
   __________________________________________
   __________________________________________
That is important to me because…

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

3. Finally, I will be successful if I…

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

That is important to me because…

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

Before handing in your assignment, check to make sure it meets or exceeds the following assessment criteria:

– The reflection is composed of at least six complete sentences.
– The reflection uses the prompts to help explain what success means to the student.
– The reflection is clear and thoughtful.
– The reflection is neat and uses proper spelling and grammar.
Purpose
This activity introduces students to the different post-high school options, as well as some information about how to get there.

Suggested Grade Level:
9

Materials and Handouts
Use only pages 1 & 2 from “Worksheet: Options After High School” (Step 1 on the worksheet)
Options After High School Reading

Approximate Time Needed:
30 minutes

Student-Facing Instructions
Once you graduate from high school, you will have many different options for what direction to head in next. It’s important to start thinking about those choices now, so you can be prepared.

Part 1:
Read and annotate the Reading: Options After High School.
List and discuss questions you have.

Part 2:
The worksheet is designed to help you think about how what you’re learning applies to your personal plans for the future. Complete Step 1 from the worksheet.

Assessment
Completion of worksheet.

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Instructions

Once you graduate from high school, you will have many different options for what direction to head in next. It’s important to start thinking about those choices now, so you can be prepared.

Part 1:
Read and annotate the Reading: Options After High School.
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Reading: Options After High School

Make It Local | Modify the section of this document on four-year colleges and universities. Include descriptions and important facts about the state and private universities your students may be likely to attend. Once updated with specifics about these postsecondary options, remove this callout and re-save the file before distributing it to students.

Once you graduate from high school, you will have many different options for what direction to head in next. It’s important to start thinking about those choices now, so you can be prepared.

In this course, you have been thinking about your future and what you might want to do for a career. Figuring out a career path can help you choose the right options for education and training once you get out of high school.

Community College

Community colleges are an affordable option for anyone who is 18 years old or has a high school diploma. Community colleges are less expensive than a four-year college. The tuition is in the hundreds of dollars instead of the thousands. Usually you live at home while attending community college, which is much less expensive than living in a dorm. You can attend a community college and get trained for a career, or you can take two years at a community college and then transfer and finish getting your degree at a four-year school.

Some students attend a community college and earn a certificate in fields such as automotive repair, firefighting, fashion merchandising, multimedia studies, or vocational nursing. These certificates often take only a couple of years and then students can pursue their career. Other students begin their college careers with an Associate’s Degree from a community college and then transfer to a four-year college or university to complete their Bachelor’s Degree. An Associate’s Degree, or A.A., usually takes two years of school. A Bachelor’s Degree, or B.A., usually takes four years. Getting an A.A. can be a good option, especially for students who are paying for their own education. Many state universities have programs that make it easy to transfer from local community colleges. In some cases, it can be easier to get into a state university as a transfer student than it would be to get in as a freshman.

Four-Year Colleges and Universities

Why go to a four-year college instead of a two-year community college? It can depend on your career plans; many jobs require a four-year degree. Attending a four-year college is a very different experience from attending community college. You can live on campus in a dorm or off campus with roommates. People who want to leave home and live somewhere completely new often apply to four-year colleges, but if you live close enough, you can attend a four-year college and still live at home. There are many options for students who want to go to a four-year college.

We will focus on the two public university systems in California, as well as private colleges and universities.
California State University System (CSU)

Did you know that if the seniors who will graduate from your school this June take their a-g required courses, maintain a 2.0 GPA, and take the SAT or ACT exam, they are guaranteed to get into San Francisco State University? It’s true, through a program called San Francisco Promise (http://www.sanfranciscopromise.org/). Three of the closest CSU campuses are San Francisco State, Cal State East Bay, and Sonoma State, but there are campuses all over the state—from San Diego to Los Angeles to Sacramento and Humboldt.

The CSU system is one of the largest, most diverse, and most affordable university systems in the entire world, offering more than 200 different degree and certificate programs. A CSU is more expensive than a community college, but it is one of the least expensive four-year options, and there’s lots of financial aid. You can choose just about any major for most any career at a CSU, and more than 400,000 students do.

University of California System (UC)

The UC system is more selective than the CSU schools, which is a way of saying that the UCs are harder to get into. UCs target the upper 10% of high school students, meaning the students with the best academic records. To attend a UC, you need at least a 3.0 GPA in your a-g required courses. You will also need to demonstrate your involvement in co-curricular activities, take additional standardized tests, and write two personal statements. It is a very big accomplishment to get accepted to a UC.

Berkeley, Davis, and Santa Cruz are three of the closest UC schools, but you can also study at UC schools in Los Angeles, Santa Barbara, San Diego, or four other campuses throughout the state. Whatever your career or education plans, UCs offer world-class education at a reasonable cost. Although UCs are more expensive than CSUs, they are much less expensive than private colleges and universities. They also offer financial aid to students whose families earn below a certain amount.

Private Colleges and Universities

There are 75 different private colleges and universities throughout the state of California and many more in the rest of the country. Admissions requirements vary by school, but many of them have similar requirements to the UC schools. A student from SFUSD can apply to any school in the country—or to Canada or a school elsewhere in the world, for that matter—if he/she has the grades and is willing to do the work.

Local private universities include Stanford, University of San Francisco (USF), and St. Mary’s. Other private universities in California include University of Southern California (USC), Pepperdine, and Loyola Marymount (LMU). Private colleges and universities offer a high quality education, but they can be much more expensive than UCs or CSUs. On the other hand, they also offer financial aid to eligible students. If you have your heart set on going to a private school but you don’t think you can afford it, you should apply. You never know—maybe you will get enough financial aid to enable you to attend.

Keep in mind that if you want to go to a four-year college, you need to work hard in all four years of high school. You should try to get at least Cs in all your classes; Ds will make it harder for you to get in, and Ds in a-g courses do not count toward eligibility for CSU and UC. If you get Ds or Fs, you should retake those courses to earn higher grades.

You should also note that while some four-year colleges and universities recognize high school exit exams such as the CHSPE (California High School Proficiency Examination) and the GED (General Educational Development), they often require a minimum of high school coursework (such as the a-g requirements) and college entrance exams.
Career and Technical Colleges/Art Schools

Some students are ready to get into the workforce, but they still need specialized training. Attending a career or technical school may be a good option. Computer repair, graphic animation, and cosmetology are some of the careers you can study in a career or technical college. There are also specialized colleges for visual arts, fashion design, and culinary arts.

Career and technical colleges and specialized art schools have different costs and different admissions requirements, so if you’re interested in that kind of training, you will need to check with each individual school. Sometimes you can get similar training at a community college or state university and it will cost less than the technical college. It’s important to make sure that any school you attend is a legitimate one, and not just a “diploma mill,” or a school that takes your money but doesn’t give you any real training. You can talk to the college counselors or do research on your own by checking with the US Department of Education or the Better Business Bureau before you sign up with a specific school.

Online Programs

Online education is one of the newest options for your postsecondary (after high school) education. You don’t physically go to class; instead you attend class by logging on to the computer from your home, the library, or anywhere you have Internet access.

Online programs are ideal for people who need a lot of flexibility. Many people use online programs to get additional training while still working a full-time job. Online programs can be certificate or short training programs, and you can also get a college degree online. With online programs, it’s also important to make sure that you are dealing with a reputable school and not a diploma mill.

With online programs, you need to think about what kind of student you are and what kind of college experience you want. You don’t have a teacher in the room with you when you take an online program, and you can “go to class” while sitting on the couch at home. That sounds great, but you need to make sure you are disciplined enough to get your work done. Some people need more structure to succeed—they need to meet face-to-face with their professors and they need to sit in a classroom to concentrate. Also, if you’re looking for a chance to live in the dorms, join a fraternity, or go to a college football game, you won’t get that with an online program.

Employment/On-the-Job Training

In some careers, you need on-the-job training more than you need a degree. For example, if you want to be a carpenter, you may want to pursue an apprenticeship, not a degree. Apprenticeships are positions where you learn a specific trade by working at it. Carpenters and other trades all need some kind of postsecondary training, either apprenticeships or classes.

For some jobs, however, you can learn a lot by joining the workforce. This can sound very appealing—no more school, and you get to start earning money right away. But remember the limited earning power of a person with only a high school diploma: on average, a person with a bachelor’s degree earns over $20,000 more a year than a person with a high school diploma. If you want to jump into the work world right away, keep in mind that you will probably need to get some additional training at some point in your career in order to boost your earning power. You could also consider getting a certificate or on-the-job training while you continue to take college classes.
Gap Year

Some students want to go to college, but not yet. In many cases, these students haven’t figured out what they want to do, and they don’t want to spend the money on college until they have a plan for their future. For these students, a “gap year” can be the way to go.

Students who take a gap year may work, travel, or volunteer. Volunteering can be an especially good way to explore future options. AmeriCorps is a volunteer program run by the US government, which offers you a chance to earn money to help pay for your education.

AmeriCorps volunteers work with nonprofit organizations all over the country, including Habitat for Humanity, Girl Scouts/Boy Scouts, Teach For America, and City Year. If you join AmeriCorps, you might help build houses, clean up the environment, or work with kids.

A gap year can be a good idea for some students—if they use their time wisely. Taking a year after high school to sit around and watch TV is not the point. But for some students, taking a year to volunteer, raise money to pay for college, and learn more about themselves and the world around them is the best choice they can make.

Ways You Can Prepare for Options After High School

So many choices—what should you do? Fortunately, you don’t need to decide right now. The best thing you can do now is to take the steps to give yourself as many options as possible:

- Work to get at least a C in all of your required courses. Ask for help whenever you need it; the higher your grades are, the more opportunities you will have.

- Take time to think about the different paths you can take and find out about the kind of education or training you need for future careers.

- Prepare for the standardized tests you may need to take.

- Start thinking about ways to fund your education through scholarships, grants, or loans.

Standardized Tests: ACT and SAT

There are two different sets of tests for college admissions: the PLAN/ACT and the PSAT/SAT.

You will need to take either the ACT or the SAT if you plan to attend a four-year college. The ACT test measures your ability to do college-level work in English, math, reading, and science (there is also an optional writing test). The SAT Reasoning Test has three sections: Math, Critical Reading, and Writing. Some colleges also require or recommend a couple of SAT Subject Tests (there are over 20 Subject Tests available, ranging from American History to Modern Hebrew).

The PLAN and the PSAT are the practice tests you may take in advance to help you prepare for the ACT and the SAT, respectively. You take the practice tests to give you an idea of how you might do on the actual test; the PSAT is also used to identify high school juniors who might qualify for National Merit scholarships. There are many books and some online programs that help you get ready to do as well as possible on these tests. Some high schools have tutorials or mentors who can help students prepare for these exams.

When can you take these tests?

<table>
<thead>
<tr>
<th>PLAN</th>
<th>10th Grade</th>
</tr>
</thead>
</table>

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<table>
<thead>
<tr>
<th>Test</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSAT</td>
<td>11th Grade Fall (some schools offer a practice PSAT in 10th grade)</td>
</tr>
<tr>
<td>ACT</td>
<td>11th Grade Spring/12th Grade Fall</td>
</tr>
<tr>
<td>SAT Reasoning and SAT Subject Tests</td>
<td>11th Grade Spring/12th Grade Fall</td>
</tr>
</tbody>
</table>

Funding Your Education

You will learn more about different ways to fund your education later in this lesson. Right now, it’s important to remember that the better your grades are the more funding options you will have. So keep your options open by working hard and earning the best grades you can.
Worksheet: Options After High School

Student Name: ____________________________ Date: ______________

Directions: This worksheet is designed to help you think about how what you’re learning applies to your personal plans for the future. Before you begin, read through all of the instructions on this worksheet, and read the assessment criteria at the end to make sure you understand how your work will be assessed. Note that you will only complete Step One now; the other steps are completed later in the lesson.

**Step One: Complete as you read Student Resource 10.2**

Student Resource 10.2 introduces you to many different options for education options after high school. As you read, think about which options might be a good fit for you, based on your interests, your career goals, and your personal circumstances (family, finances, etc.). You need to choose two options and complete the chart below for each of them. In the chart, write down what option you chose from the list below the example. Then write a short description of what the option is, why it might be a good fit for you, and why it might not. An example is provided.

Example:

<table>
<thead>
<tr>
<th>Option</th>
<th>Four-Year College or University</th>
</tr>
</thead>
<tbody>
<tr>
<td>What Is It?</td>
<td>A school that lets you earn a Bachelor’s Degree (B.A.); you attend for four years.</td>
</tr>
<tr>
<td>Why It Might Be a Good Fit for Me</td>
<td>I want to be a nurse. I can get that training at a community college, but if I go to a four-year school I can become a registered nurse and make more money. Also, I like to play sports and bigger schools usually have better sports teams.</td>
</tr>
<tr>
<td>Why It Might Not Be a Good Fit for Me</td>
<td>Four-year schools are really expensive. Plus, you have to take tests to get in (SATs, etc.) and I’m not good at taking tests.</td>
</tr>
</tbody>
</table>

Now that you’ve reviewed the example, complete the chart for two options on the next page.

Options:

- Community College
- Career or Technical College
- Online Program
- On-the-Job Training
- Four-Year University or College
- Art School
- Gap Year

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The Two Options that Look the Best for Me Are:

<table>
<thead>
<tr>
<th>Option</th>
<th>What Is It?</th>
<th>Why It Might Be a Good Fit for Me</th>
<th>Why It Might Not Be a Good Fit for Me</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>
Unit Culminating Task:
My Options After High School Reflection

Purpose
This activity introduces students to the different post-high school options, as well as some information about how to get there.

Suggested Grade Level:
9

Materials and Handouts

Approximate Time Needed:
50-90 minutes

Student-Facing Instructions

Part 1:
Now that you’ve completed:
- What I Want For My Future
- My Life So Far
- Planning My Time Effectively
- Options After High School Worksheet

Share your post-high school options to someone older (a junior, senior, parent, guardian, relative, friend, teacher). Take notes on:
- Their reaction, thoughts, feedback
- Their suggestions for how to reach your goals

Part 2:
Then write a one-page reflection in which you describe the options you wrote in the worksheet chart, and the feedback and suggestions from the person you shared with. Conclude with your thoughts on your next steps as you work toward your post-high school future.

Teacher Notes
Unit Culminating Task Prerequisites: Minimum - completion the “Options After High School Worksheet”. Completing the other lessons in this unit (“What I want for My Future”, “My Life So Far”, and “Planning My Time Effectively”) as well will help add depth to student reflections.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Growth/Personal reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

Teacher Resource

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Part 1:
Now that you’ve completed:
• What I Want For My Future
• My Life So Far
• Planning My Time Effectively
• Options After High School Worksheet
Share your post-high school options to someone older (a junior, senior, parent, guardian, relative, friend, teacher). Take notes on:
• Their reaction, thoughts, feedback
• Their suggestions for how to reach your goals

Part 2:
Then write a one-page reflection in which you describe the options you wrote in the worksheet chart, and the feedback and suggestions from the person you shared with. Conclude with your thoughts on your next steps as you work toward your post-high school future.
Research
College Options
### Purpose
The purpose of this activity is to familiarize students with key college terminology that they will need before doing college research.

### Suggested Grade Level:
11

### Materials and Handouts
Key Terms

### Approximate Time Needed:
50 minutes

### Student-Facing Instructions
Divide up the list of key terms for students to research in groups. Have them write the definitions in student-friendly language. Check for correctness, and then give students poster paper to write up their definitions. Students present their definitions and post in class for future reference.

### Assessment
Completion of definitions.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Divide up the list of key terms for students to research in groups. Have them write the definitions in student-friendly language. Check for correctness, and then give students poster paper to write up their definitions. Students present their definitions and post in class for future reference.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
## It’s All About College - Key Terms

<table>
<thead>
<tr>
<th>Term</th>
<th>Notes, Definitions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Associate's Degree</td>
<td></td>
</tr>
<tr>
<td>Bachelor's Degree</td>
<td></td>
</tr>
<tr>
<td>Campus</td>
<td></td>
</tr>
<tr>
<td>Certificate Program</td>
<td></td>
</tr>
<tr>
<td>Community College</td>
<td></td>
</tr>
<tr>
<td>Commuter Campus</td>
<td></td>
</tr>
<tr>
<td>Credit Hours</td>
<td></td>
</tr>
<tr>
<td>Dormitory</td>
<td></td>
</tr>
<tr>
<td>Extracurricular Activities</td>
<td></td>
</tr>
<tr>
<td>Financial Aid</td>
<td></td>
</tr>
<tr>
<td>Notes, Definitions</td>
<td></td>
</tr>
<tr>
<td>--------------------</td>
<td></td>
</tr>
<tr>
<td><strong>Major</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Minor</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Private Institution</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Residential Campus</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Rolling Admissions</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>State University</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Technical (or Trade) School</strong></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# My Ideal College Profile

## Purpose

The purpose of this activity is for students to identify their own criteria for an ideal college before applying.

## Suggested Grade Level:

11

## Materials and Handouts

Ideal College Profile
Postsecondary Options Overview

## Approximate Time Needed:

15 minutes

## Student-Facing Instructions

Skim through the handout, “Post-secondary Options: An Overview”. You may be asked to write down 3 questions you will use to quiz a classmate about the information on the handout. Refer to your teacher’s instructions.

Read and complete the handout, “Ideal College Profile”.

## Assessment

Completion of Ideal College Profile sheet.

---

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Student Resource

Instructions

Skim through the handout, “Post-secondary Options: An Overview”. You may be asked to write down 3 questions you will use to quiz a classmate about the information on the handout. Refer to your teacher’s instructions.

Read and complete the handout, “Ideal College Profile”.

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# Ideal College Profile

There are many factors to consider when choosing a college. Read through the factors listed below and take some time to think about which ones are important to you -- and why. If you decide a certain factor is important to you, check it off and write it in the space on the last page for “My Ideal College.” You may think of some factors that aren’t listed here. When you’re finished, you’ll have a clearer picture of your ideal school.

<table>
<thead>
<tr>
<th>LOCATION</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ In your hometown</td>
<td>☐ In your home state</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TYPE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ 4-year college or university</td>
<td>☐ 2-year college</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ENVIRONMENT</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Urban</td>
<td>☐ Suburban</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LIVING ARRANGEMENTS</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ At home</td>
<td>☐ On-campus dormitory</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SIZE</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Large (greater than 10,000)</td>
<td>☐ Medium (4,000-10,000)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADMISSIONS CRITERIA</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Highly competitive - A or B grade point average; top 20% of class; SAT 1800-2400; ACT above 29</td>
<td></td>
</tr>
<tr>
<td>☐ Competitive - B/C grade point average; top 50% of class; SAT 1500-1800; ACT above 21</td>
<td></td>
</tr>
<tr>
<td>☐ Less Competitive - C- grade point average; top 65% of class; SAT below 1500; ACT below 21</td>
<td></td>
</tr>
<tr>
<td>☐ Non-Competitive - C to D grade point average; no admissions test required</td>
<td></td>
</tr>
</tbody>
</table>
### CAMPUS LIFE – STUDENT BODY

- [ ] Co-ed
- [ ] Single sex
- [ ] Resident
- [ ] Commuter
- [ ] High ethnic diversity
- [ ] Some ethnic diversity
- [ ] Diversity not a factor

Have student groups for:
- [ ] Women
- [ ] Students of color
- [ ] International students
- [ ] LGBTQ students
- [ ] Other

### CAMPUS LIFE – EXTRA CURRICULAR ACTIVITIES

- [ ] Competitive sports (collegiate or intramural)
- [ ] Music
- [ ] Fine Arts
- [ ] Performing Arts
- [ ] Other

### COSTS PER YEAR – TUITION, ROOM, BOARD

- [ ] Up to $5,000
- [ ] $5,000-$15,000
- [ ] $15,000-25,000
- [ ] Above $25,000

% of students receiving financial aid?

### ACADEMIC OFFERINGS – MAJORS YOU MIGHT BE INTERESTED IN

- [ ] Agricultural
- [ ] General Studies
- [ ] Biological Studies
- [ ] Liberal Arts
- [ ] Business
- [ ] International Relations
- [ ] Communications/Journalism
- [ ] Law/Criminal Justice
- [ ] Computer Science
- [ ] Media Arts/Communications
- [ ] Culinary Arts
- [ ] Medicine
- [ ] Education
- [ ] Political Science
- [ ] Engineering
- [ ] Psychology
- [ ] Fine Arts/Applied Arts
- [ ] Recreation
- [ ] Foreign Language
- [ ] Social Sciences
- [ ] Health Sciences
- [ ] Undecided
### OTHER FACTORS

#### TEACHING STYLE:
- [ ] Large lectures
- [ ] Small seminars
- [ ] Professors teach most classes
- [ ] Teaching assistants teach many classes

#### AVERAGE CLASS SIZE:

#### FLEXIBLE CLASS TIMES

- [ ] Evenings
- [ ] Weekends
- [ ] Part-time

#### ADDITIONAL CRITERIA (list below)

#### MY IDEAL COLLEGE

Summarize what you marked off in the sections above:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

50
Postsecondary School Options: An Overview

Universities
Universities tend to be large schools with a wide variety of programs. They may have several undergraduate and graduate schools, colleges, departments, or faculties (School of Engineering, College of Business, Department of Sociology, Faculty of Science, etc.). Universities have undergraduate divisions that award bachelor's degrees and graduate schools that award master's degrees. Some universities offer professional schools that award doctorates. Universities tend to have research facilities and an abundance of social opportunities (fraternities, sororities, sporting events, clubs, etc.). Universities may be public or private.

Colleges
Colleges tend to be smaller than universities, but they still have a variety of programs. (Please note: Although colleges do tend to be smaller than universities, there are still some colleges that are just as big as or even bigger than a university.) Four-year colleges offer bachelor's degrees. Graduate degrees may or may not be offered. The size of classes and types of social opportunities will vary from college to college. A college may be public or private, an independent institution or part of a larger university.

Community Colleges/Junior Colleges
Community colleges and junior colleges are two-year institutions that award associate's degrees and sometimes certificates in certain career-related subjects. These two-year colleges usually have less strenuous admissions standards and tend to be less expensive than four-year colleges and universities. Because of this, some students choose to attend a two-year college first to earn an associate's degree, and then they transfer to a four-year school to receive a bachelor's degree. If this is done, taking courses that can be transferred is highly recommended. Community colleges are public and non-residential, while junior colleges are private with students living on campus or in the surrounding community.
Technical/Vocational/Proprietary Schools

Technical, vocational, and proprietary schools emphasize preparation for specific careers, such as accounting, cosmetology, computer technology, culinary arts, health care technology, real estate, etc. Some schools specialize in only one area, while others provide a wide variety of programs. They award diplomas, certificates, licenses, and sometimes associate's degrees and bachelor's degrees. Although receiving accreditation from these schools will usually grant employment, students may or may not be able to transfer credits to traditional academic degree programs. The entire course of study at a vocational or technical school is often two years or less, although some can be three or four years long. Some of these schools are privately owned and operated, while others are public.

Public vs. Private

Public postsecondary schools are supported by state funds. Tuition for a public school is usually less expensive than that of a private school. Moreover, public school tuition for an in-state student is much less expensive than for an out-of-state student.

Private postsecondary schools are supported by tuition and donations. They are not tax-supported. While private school tuition tends to be higher than public school tuition, private schools can sometimes offer more financial aid to students for better affordability.

Source: www.ECampusTours.com
Purpose
This activity serves to prepare students for making connections and obtaining relevant information at a college fair.

Suggested Grade Level:
11

Materials and Handouts
College Fair Guidelines

Approximate Time Needed:
10 minutes

Student-Facing Instructions
Read through the College Fair Guidelines handout. Jot down your answers to the questions to ask yourself. Then circle 4 - 7 questions in the section “Questions to Ask at the Fair” that are most important to you. You may add your own questions as well. Be sure to take this worksheet with you, and to take notes about each college you talk with at the fair.

Assessment
Completion of worksheet.
Instructions

Read through the College Fair Guidelines handout. Jot down your answers to the questions to ask yourself. Then circle 4 - 7 questions in the section “Questions to Ask at the Fair” that are most important to you. You may add your own questions as well. Be sure to take this worksheet with you, and to take notes about each college you talk with at the fair.
College Fair Guidelines

You should consider attending at least one college fair or college night in your area. College Fairs are excellent opportunities to efficiently contact college admissions staff and collect information about prospective schools.

**Questions to ask yourself before attending the fair:**
1. How large of a school do you want to attend?
2. What type of school are you looking for?
3. How far away from home do you want to go?
4. What type of environment (rural, small town, suburban or urban) do you want?
5. What type of majors are you considering?
6. What sports or clubs are you looking for?
7. How much are you willing or able to pay for college?
8. What is your selectivity range of schools?
9. Do you have a disability that requires special services in college?

**Questions to ask while at the fair:**
1. What high school courses are required for admission?
2. What is the average GPA of entering freshman and SAT/ACT test scores for the previous year?
3. What are the deadlines for admissions and financial aid?
4. What factors are most important in the decision: essay, high school transcript, recommendations, activities or something else?
5. What are the graduation rates and retention rates for the school?
6. What is the job placement rate for certain majors that you are interested in?
7. What kinds of scholarship opportunities are available?
8. How many students receive financial aid?
9. What is the average financial aid package at the school?
10. How much does it cost to attend the school for a year (tuition, room and board and fees?)
11. What housing options are available?
12. How many years of housing are guaranteed?
13. How safe is the campus?

Things to do at the college fair:
1. Collect college information about specific programs and colleges from the tables.
2. Talk to the admissions staff...get their name and give them your name.
3. Fill our inquiry cards that are available.

Things to do after the college fair:
1. Make notes about what you learned while it is still fresh in your mind.
2. Write down any questions that need to be asked later.
3. Follow up on any contacts that you made at the fair.
# Career Education Connection

## Purpose

The purpose of this activity is to show students what educational requirements (degrees, and majors, specifically) are required for careers of interest to them.

## Suggested Grade Level:

11

## Materials and Handouts

- Career Education Connection Worksheet

## Approximate Time Needed:

50 minutes

## Student-Facing Instructions

**Part 1:**
Think of three careers that interest you and complete the worksheet based on your research of these careers.

**Part 2:**
Choose one career and organize the information you researched about it into a visual presentation.

## Teacher Notes

One worksheet question is California-specific. There is an optional oral presentation component to this lesson. Students can use any career interest surveys or career research websites/tools for this activity. Some career interest surveys and career websites are:

- http://www.bls.gov/k12/
- http://www.cacareerzone.org/
- https://secure.californiacolleges.edu/Career_Planning/_default.aspx
- http://www.discovernursing.com/
- http://explorecte.com/

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Formative Assessment

Visual presentation aligned to quality criteria:
- Student Learning Outcomes assessed in this task:
  - Presents perspective with supportive evidence
  - Uses digital media/visual displays to engage and support audience understanding

Optional Student Learning Outcomes assessed in oral presentation:
- Organizes presentation in a way that supports audience understanding
- Demonstrates command of appropriate body language and speaking skills
- Employs language appropriately and fluidly
- Responds directly and effectively to audience questions
Instructions

Part 1:
Think of three careers that interest you and complete the worksheet based on your research of these careers.

Part 2:
Choose one career and organize the information you researched about it into a visual presentation.
You will research 3 careers, and then choose 1 to present.

**Career A**

**Job Title:**

<table>
<thead>
<tr>
<th>Educational Requirements:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Degree(s):</strong></td>
</tr>
<tr>
<td><strong>Related Majors:</strong></td>
</tr>
</tbody>
</table>

**Job Description:**

What interests you most about this career?

What steps do you predict that you will need to take toward this career?

List some professionals already in this field. What are they known for?

**Possible Employers:**

Average wage/salary in California:

**Bibliography:** List the sources/websites that you use to find your information

---

60
Career B
Job Title:

Educational Requirements:
Degree(s):
Related Majors:

Job Description:

What interests you most about this career?

What steps do you predict that you will need to take toward this career?

List some professionals already in this field. What are they known for?

Possible Employers:

Average wage/salary in California:

Bibliography: List the sources/websites that you use to find your information
Career C

Job Title:

Educational Requirements:
Degree(s):
Related Majors:

Job Description:

What interests you most about this career?

What steps do you predict that you will need to take toward this career?

List some professionals already in this field. What are they known for?

Possible Employers:

Average wage/salary in California:

**Bibliography:** List the sources/websites that you use to find your information
Purpose
This lesson gives students an organization tool to document their research on colleges.

Suggested Grade Level:
11

Materials and Handouts
College Research Worksheet

Approximate Time Needed:
Several Days or Weeks

Student-Facing Instructions
Use this worksheet to document your research about various colleges. Be sure to pay attention to the “Likely”, “Target”, “Reach” etc. definitions at the bottom of the document, as you will also need to refer to these in your unit culminating task.

Teacher Notes
Add or edit research criteria according to your students’ needs and interests.

Assessment
Completion of worksheet.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Student Resource

Instructions

Use this worksheet to document your research about various colleges. Be sure to pay attention to the “Likely”, “Target”, “Reach” etc. definitions at the bottom of the document, as you will also need to refer to these in your unit culminating task.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
<table>
<thead>
<tr>
<th>Location: Region, State, City</th>
<th>ME (enter your info here)</th>
<th>School 1</th>
<th>School 2</th>
<th>School 3</th>
<th>School 4</th>
<th>School 5</th>
<th>School 6</th>
<th>School 7</th>
<th>School 8</th>
<th>School 9</th>
<th>School 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Majors: List majors you're interested in offered at this college</td>
<td>Major 1:</td>
<td>Major 1:</td>
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<tr>
<td>Type of School:</td>
<td>4-year</td>
<td>Community College</td>
<td>Vocational/Trade</td>
<td>Other</td>
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<tr>
<td>School Size:</td>
<td>Very Large: 20k+</td>
<td>Large: 13k-20k</td>
<td>Medium: 7k-13k</td>
<td>Small: 2k-7k</td>
<td>Very Small: &lt;2,000</td>
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<tr>
<td>School Setting:</td>
<td>Urban, Suburban, Rural</td>
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<td>Public or Private?</td>
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<td>Gender:</td>
<td>All Male, All Female, Coed</td>
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<td>Religious Affiliation:</td>
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<td>Weather:</td>
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<td>Total Cost of Attendance:</td>
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<td>Term</td>
<td>Description</td>
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<tr>
<td>Likely</td>
<td>Your grades and test scores are higher than the average grades and test scores of students admitted at the college.</td>
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<tr>
<td>Target</td>
<td>Your grades and test scores are about the same as the average admitted at the college.</td>
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<tr>
<td>Reach</td>
<td>Your grades and test scores are lower than the average admitted at the college. Or the overall chance of admission is around 20-25% at this college.</td>
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<tr>
<td>Lottery</td>
<td>Any school where the admissions rate is under 20%, even if your test scores and grades are about the same as or above the average range admitted at the college.</td>
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<tr>
<td>Financial Safety</td>
<td>All students who will need financial aid will need a financial safety on their list. This is a college that you will likely be admitted to and you will likely be able to pay for it.</td>
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</table>
## Purpose
This activity is designed to help students see the potential similarities and differences in studying the same major at different college campuses.

### Suggested Grade Level:
11

## Materials and Handouts

### Approximate Time Needed:
50 Minutes

## Student-Facing Instructions
Think of one major that you’re interested in and research what that major looks like at 3 different college campuses. Complete the Comparison Chart and then write an argumentative paragraph describing how your research reveals what’s most important to you in this major.

## Formative Assessment
Argumentative paragraph aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Develop an argument and draw meaningful connections and conclusions
- Organize and structure argument consistently and logically
- Review prior learning for a broader perspective about educational or life events

Optional Student Learning Outcomes:
- Demonstrates command of standard English conventions
- Skillfully uses written language to convey ideas and understanding

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Think of one major that you’re interested in and research what that major looks like at 3 different college campuses. Complete the Comparison Chart and then write an argumentative paragraph describing how your research reveals what’s most important to you in this major.
## Major & Campus Comparison Chart

Major:
Related majors/other names for this major:
What's your goal for this major?

<table>
<thead>
<tr>
<th>College Name</th>
<th>Location</th>
<th>How large is the major (How many professors? How many students?)</th>
<th>Concentrations/ Specialties?</th>
<th>Look at the courses listed for this major. What is one course title/description that you're particularly interested in? Why?</th>
<th>What is unique about this major at this</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>campus? Are there opportunities that are special to this campus?</td>
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<tr>
<td>---------------------------------------------------------------</td>
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</tr>
<tr>
<td>Major/Campus Reflection: How do the majors at the various campuses compare? What is most important/valuable to you in this particular major?</td>
<td></td>
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</tr>
</tbody>
</table>
Unit Culminating Task:  
College Options Written Rationale

**Purpose**

The purpose of this written rationale is for students to be able to articulate deep reflective and researched reasons why they want to apply to certain colleges, as well as to make sure that they are applying to colleges across an appropriate range of accessibility.

**Suggested Grade Level:**

11

**Materials and Handouts**

Likely, Target, Reach Definitions

**Approximate Time Needed:**

Several class periods

**Student-Facing Instructions**

You have researched many different college campuses. You will choose three of those campuses, one likely, one target, and one reach, and write a rationale for why these colleges are on your list and what your next steps are.

Your rationale will be 5 paragraphs long, including:

1. **Introduction:**
   - What have you done to lead up to this point?
   - What has this process of researching and writing about colleges meant for you?

2. A paragraph for each college in which you will address the following:
   - Why do you like that college? (Size, location, major, internships, courses, price tag, support structures, etc.? Include anything from your detailed college research or other research/visits that stands out to you.)
   - What are your goals for attending that college? (What opportunities do you want to take advantage of? What career or graduate studies do you want to be prepared for? What clubs, sports, etc. do you want to be a part of? How will this college help support these goals?)
   - What are the admissions statistics for that campus and how is it a “likely”, “target”, or “reach” college for you?

3. A conclusion that addresses:
   - How do these three colleges demonstrate the ideals of your best fit college?
   - What do your college choices mean for your post-secondary path?

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Teacher Resource

- What has this process revealed to you about...(yourself? your expectations? your goals? etc.)
- What do you foresee... (as upcoming challenges or successes? over the course of your senior year? with your family? with actually going to college? as the victory? as your next personal step for you as an individual? etc.)
- So what?

Teacher Notes

Unit Culminating Task Prerequisites: Completion of the following lessons: “Career & Education Connection”, “College Research”, and “Compare a Major Across Campuses”.

Assessment

Culminating Assessment: Written rationale assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Develop an argument and draw meaningful connections and conclusions
- Organize and structure argument consistently and logically
- Review prior learning for a broader perspective about educational or life events

Optional Student Learning Outcomes:
- Demonstrates command of standard English conventions
- Skillfully uses written language to convey ideas and understanding

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
You have researched many different college campuses. You will choose three of those campuses, one likely, one target, and one reach, and write a rationale for why these colleges are on your list and what your next steps are. Your rationale will be 5 paragraphs long, including:

1. Introduction:
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   - What are your goals for attending that college? (What opportunities do you want to take advantage of? What career or graduate studies do you want to be prepared for? What clubs, sports, etc. do you want to be a part of? How will this college help support these goals?)
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3. A conclusion that addresses:
   - How do these three colleges demonstrate the ideals of your best fit college?
   - What do your college choices mean for your post-secondary path?
   - What has this process revealed to you about...(yourself? your expectations? your goals? etc.)
   - What do you foresee... (as upcoming challenges or successes? over the course of your senior year? with your family? with actually going to college? as the victory? as your next personal step for you as an individual? etc.)
   - So what?
### Likely, Target, Reach Definitions

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely</td>
<td>Your grades and test scores are higher than the average grades and test scores of students admitted at the college.</td>
</tr>
<tr>
<td>Target</td>
<td>Your grades and test scores are about the same as the average admitted at the college.</td>
</tr>
<tr>
<td>Reach</td>
<td>Your grades and test scores are lower than the average admitted at the college. Or the overall chance of admission is around 20-25% at this college.</td>
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<tr>
<td>Lottery</td>
<td>Any school where the admissions rate is under 20%, even if your test scores and grades are about the same as or above the average range admitted at the college.</td>
</tr>
<tr>
<td>Financial Safety</td>
<td>All students who will need financial aid will need a financial safety on their list. This is a college that you will likely be admitted to and you will likely be able to pay for it.</td>
</tr>
</tbody>
</table>
Visit a College
# Why Visit Colleges?

## Purpose

The purpose of this lesson is to get students to think about what they can learn from visiting colleges.

## Suggested Grade Level:

11

## Materials and Handouts

Why Visit Colleges

## Approximate Time Needed:

20 Minutes

## Student-Facing Instructions

Look at the handout, “Why Visit Colleges?” and write down your thoughts. Share your answers with a partner and come up with a consolidated list. Then you will share your answers with the class.

## Teacher Notes

Additional resource for teachers: https://bigfuture.collegeboard.org/find-colleges/campus-visit-guide/why-visit-colleges

## Assessment Notes

Completion of shared answers.

---

Adapted from the 11th Grade College Readiness: Prepare for the College Visit workshop.

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Instructions

Look at the handout, “Why Visit Colleges?” and write down your thoughts. Share your answers with a partner and come up with a consolidated list. Then you will share your answers with the class.
Everyone tells you that you should visit colleges before applying and (for some of you) we’ve visited one or two already as a class. But, why is it necessary, especially with so much information available on the web, including “virtual” tours?

Why do you think it’s important to see a college in person? Think of as many reasons as you can and write them below. When you are finished, share your responses with your partner. Add any reasons you did not have onto your list so that you have a combined list to share with the class.

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.
Purpose
The purpose of this lesson is to get students to think about what they can learn from visiting colleges.

Suggested Grade Level:
11

Materials and Handouts
Pre-Visit College Research Worksheet

Approximate Time Needed:
50 Minutes

Student-Facing Instructions

Part 1:
Before we visit (enter college name), you’ll do some research about the campus. In your groups, count off 1-4 and you will do online research as follows:

#1: Overview
#2: Admissions
#3: Financial Aid
#4: Campus Life

Part 2:
When you’re done, you will share your research with the rest of your group and take notes on what they share out.

Part 3:
After sharing your research with each other, what new questions do you have about this college?

Assessment Notes
Completion of worksheet

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Part 1:
Before we visit (enter college name), you’ll do some research about the campus. In your groups, count off 1-4 and you will do online research as follows:

#1: Overview  
#2: Admissions  
#3: Financial Aid  
#4: Campus Life

Part 2:
When you’re done, you will share your research with the rest of your group and take notes on what they share out.

Part 3:  
After sharing your research with each other, what new questions do you have about this college?
Pre-Visit College Research Worksheet

Name of College, University or Institution:

Location:

# 1 OVERVIEW and ADMISSIONS

What kind of school is this?

- Two-year community college or 4-year college or university?
- State university or independent private institution?
- Technical or professional trade school?

What are the admissions requirements?

What percent of the applicants who applied were admitted? ______

How large is it?
# undergraduates ______ # graduate students ____________

What is the ethnic composition of the school – that is, the percentages of the different ethnic groups on campus?

# 2 ACADEMICS

What different degrees are offered?
• Associate degree?

• Bachelor’s degree?

• Technical training certificate?

What sort of special program opportunities are there, such as internships, independent study, double majors, semesters abroad, work-study, etc.?

List 5 different majors that are available at this school:

1.

2.

3.

4.

5.

What is the average class size, and the student to faculty ratio?

Are most classes taught by professors or by teaching assistants?

# 3 COST AND FINANCIAL AID

What does it cost per year to take classes? (tuition) ___

What does it cost to live on campus? (room) ___

What does it cost for meals? (board) ____
What does it cost for books and supplies? _____

What is the total cost to go to this school?

# 4 CAMPUS LIFE

Describe the campus -- is it urban, rural, sprawling, crowded....?

Where are the classes located?
Where are the dorms?
The eating places?
The library?

What kind of housing options does this school have for students? Is it a residential campus, commuter school, or both?

What kinds of extracurricular activities are available for students? List at least 5, including some you might be interested in.

1.  
2.  
3.  
4.  
5.  

After sharing your research with the rest of your group, what new questions do you have about this college?
Prepare For Your Own College Visit

Purpose

The purpose of this lesson is to inform students on how to plan for their own college visits and gather information once they’re there.

Suggested Grade Level:

11

Materials and Handouts

College Visit Notes Where Do I Go To
Preparing For Your Visit Know Before You Go
College Visit Checklist
Key Information To Gather

Approximate Time Needed:

10 Minutes

Student-Facing Instructions

Arrange and go on your own college visit. Be sure to include attending an information session, a group tour, and an interview if possible. Look at the handouts, “Preparing for Your Visit: Know Before You Go”, “Campus Visit Checklist” and “Key Information to Gather from the College Visits”. Bring the last two handouts with you on the visit. After the visit, turn in the completed “Key Information to Gather” handout.

Teacher Notes

There are several different college visit note-taking forms in this lesson. Choose the ones that work best for your students.

Assessment Notes

Completion of college visit note-taking chart.

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### Instructions

Arrange and go on your own college visit. Be sure to include attending an information session, a group tour, and an interview if possible. Look at the handouts, “Preparing for Your Visit: Know Before You Go”, “Campus Visit Checklist” and “Key Information to Gather from the College Visits”. Bring the last two handouts with you on the visit. After the visit, turn in the completed “Key Information to Gather” handout.
College Visit Notes: Where Do I Go To…?

While you’re on the college campus, find out where the most important buildings and offices are.

<table>
<thead>
<tr>
<th>Where do I go to…</th>
<th>Name of Building or Office</th>
</tr>
</thead>
<tbody>
<tr>
<td>find out about admissions requirements and deadlines?</td>
<td></td>
</tr>
<tr>
<td>get financial aid information?</td>
<td></td>
</tr>
<tr>
<td>pay for classes?</td>
<td></td>
</tr>
<tr>
<td>register for classes?</td>
<td></td>
</tr>
<tr>
<td>get dormitory information?</td>
<td></td>
</tr>
<tr>
<td>find out about student activities?</td>
<td></td>
</tr>
<tr>
<td>learn about study abroad opportunities?</td>
<td></td>
</tr>
<tr>
<td>get student support programs information?</td>
<td></td>
</tr>
<tr>
<td>What other important offices are there on this campus?</td>
<td></td>
</tr>
</tbody>
</table>
Preparing for your Visit: Know before You Go

Research the College
It's important to know something about the college before you arrive on its campus, especially if you have an interview scheduled.

- Review the view books, course catalogs, and any other materials the college sends to prospective students
- Spend some time surfing their website
- Talk to currently enrolled students or alumni about their college. Some college websites let you contact them online, or you can get their contact information from the admissions office

Scheduling Your Trip
Pick a time that's convenient to you, but try to go when classes are in session. That way, you can sit in on a lecture or stay in a dorm overnight. You'll only get a true feel for the campus if you're there on a day when classes are in full swing.

Schedule your time on campus, too, to make sure you'll have time for everything you want to do:

- Find out how often college tours run, and if you have to sign up in advance
- Be sure to get a map of the school. You don't want to spend half your day trying to park or find the admissions office
- If an interview is suggested, make an appointment. Also, consider meeting with the financial aid officer
- If you're curious about a club, program, or a sport, arrange to attend a practice, rehearsal, or meeting

Pack a Camera and Notebook
If you go to more than college...Was it X College or Y University that had that excellent exercise equipment in the gym? Where did I talk to that cool psychology professor? You think you'll remember everything, but you'll be surprised how colleges start to merge after you've seen a few.

What's Important to You?
Make a list of what college characteristics are most important to you, so you know what to evaluate. Do you feel overwhelmed in a large lecture hall? Check out the class size. Do you have your heart set on joining a sorority or fraternity? See what the Greek system is like on campus. Is there a particular major that you want to pursue? Talk to current students or professors in that department.

Develop a list of your preferences. Take this list to the schools that you plan to visit, and compare them when you get back home.

www.collegeboard.com/student/csearch/college-visits
To help you find the right college, fill out one of these forms each time you visit a school.

**College Name**

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<th>College Name</th>
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<tr>
<th>City</th>
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<th>Size</th>
<th>Tuition</th>
<th>Room &amp; Board</th>
<th>Financial Aid Options</th>
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**Admissions Contact**

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**To-Do Checklist**

- [ ] Talk to professors
- [ ] Visit the library
- [ ] Tour campus
- [ ] Sit in on a class
- [ ] Eat at a cafeteria
- [ ] Talk to admissions office
- [ ] Read the college newspaper
- [ ] Check out computer labs
- [ ] Talk to students
- [ ] Visit student housing
- [ ] Read bulletin boards
- [ ] Check out recreational facilities
- [ ] Check out student activities
- [ ] Tour the city around campus
- [ ] Eat at an off-campus student hang-out
- [ ] Picture yourself living here

**Rate It**

On a scale of 1-5, five being the best, rate the following:

- People
- Social life
- Classrooms
- Residence Halls
- Town
- Campus
- Food

**Ask a Student**

- What is the best part about this college?
- What is the worst part?
- What is a typical day like?
- What do the students do on the weekends?
- How are classes structured?
- Why did you choose this college?

**The best part about my visit**

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<th>The best part about my visit</th>
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**The worst part about my visit**

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**Cappex Fit Fact:** Weather on the day of a college visit can affect your impression of a school. Don’t let the rain keep you from a school you like. Now, find out which colleges want you at Cappex.com. It’s free and easy!
### Key Information to Gather from the College Visit

#### Sample Questions – Admissions

<table>
<thead>
<tr>
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<tbody>
<tr>
<td>• When is your application deadline?</td>
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<tr>
<td>• Do I need to take an entrance exam (SAT, ACT, etc.)?</td>
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<tr>
<td>• Is there a minimum score required?</td>
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<tr>
<td>• What do I have to do to get accepted?</td>
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<tr>
<td>• How do I increase my odds of getting accepted?</td>
</tr>
<tr>
<td>• Do you have to apply for a specific school or program within the university?</td>
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<tr>
<td>• What percent of applicants are accepted?</td>
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<tr>
<td>• <strong>How does the need for financial aid figure into the admissions process?</strong></td>
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Notes:
<table>
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<tr>
<th>Sample Questions – Students</th>
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<tbody>
<tr>
<td>• Where do most students come from geographically?</td>
</tr>
<tr>
<td>• What kinds of students attend this school?</td>
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<tr>
<td>• How diverse are the students?</td>
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Notes:

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• How big are the classes that freshmen usually take?

• How easy is it to meet with faculty?

• Who teaches the courses for first-year students?

• How many classes do you have to take each semester?

• Is there a lot of reading?

• Are there courses with labs required?

• How many of hours of homework/preparation are expected for each class?
Sample Questions – Campus Life and Housing

• What type of housing is available for students?

• Where do new students/freshmen live? (On campus? In off campus housing? At home?)

• What student activities are available?

• What activities are there on weekends?

• Do most students stay or leave campus on weekends?

• Will I have a roommate? Do I get to select my own roommate?

• Are there fraternities and sororities?

• Where do I go if I get sick?

Notes:
Sample Questions – Cost and Financial Aid

• What is the total cost of attending the college?

• What types of financial aid does the college offer and how do I apply?

• What percentage of students gets financial aid?

• Are there scholarships available?

• What’s the total cost of my program including books, fees and tuition?

• Are there jobs available on campus?

Notes:
<table>
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<th>Sample Questions – Other</th>
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<tbody>
<tr>
<td>• What do you do to help students get settled (academically and socially)?</td>
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</table>

| • Do you have pre-college summer programs? |

| • What’s unique or special about your college? |

| • How successful are the college's graduates in finding jobs? |

Notes:

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Unit Culminating Task: College Visit Reflective Essay

**Purpose**
The purpose of this lesson is to do final preparations for a reflective essay in which students describe their impressions and compare and contrast what they learned about two colleges during their visits.

**Suggested Grade Level:**
11

**Materials and Handouts**
Comparison of Colleges

**Approximate Time Needed:**
100 minutes

**Student-Facing Instructions**

**If you visited one college:**

Use your college visit notes to now write a reflective essay about your visit. Your essay should include:
- an introduction of the college and why you chose to visit
- an explanation of the most important or interesting things you learned about the college
- what impressed you the most and what surprised you during your visit
- any new questions you have that your visit raised
- any conclusions you have about the college based on your visit

**If you visited more than one college:**

Use your college visit notes as well as the completed Comparison of Colleges sheet to now write a reflective essay about your visits. Your essay should include:
- an introduction of these two colleges and why you chose to visit them
- an explanation of the most important or interesting things you learned about each college and how they compare and contrast with each other
- what impressed you the most and what surprised you during your visit
- any new questions you have that your visits raised
- any conclusions you have about each college based on your visit

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Notes

There are three options for this culminating task: a written reflection, a visual presentation, and an oral presentation, or any combination of the three.

Unit Culminating Task Prerequisites - Completion of the following lessons beforehand:
“Why Visit Colleges?”;
“Prepare for the College Visit: College Research Worksheet”;
“Prepare For Your Own College Visit”.

Assessment

Culminating Assessment: Experience/Understanding reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
• Review prior learning for a broader perspective about educational or life events
• Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes for written reflection:
• Skillfully uses written language to convey ideas and understanding
• Demonstrates command of standard English conventions

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

If you visited one college:

Use your college visit notes to now write a reflective essay about your visit. Your essay should include:

- an introduction of the college and why you chose to visit
- an explanation of the most important or interesting things you learned about the college
- what impressed you the most and what surprised you during your visit
- any new questions you have that your visit raised
- any conclusions you have about the college based on your visit

If you visited more than one college:

Use your college visit notes as well as the completed Comparison of Colleges sheet to now write a reflective essay about your visits. Your essay should include:

- an introduction of these two colleges and why you chose to visit them
- an explanation of the most important or interesting things you learned about each college and how they compare and contrast with each other
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# Comparison of Colleges

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**Overview** – What kind of school is it? (2-year, 4-year; state, private; large, small, etc.)
What is the ethnic composition? What % of students who apply are accepted?

**Academics** – What degrees are you interested in? What special programs or opportunities are there? What did you notice about class size? How accessible are the faculty?

**Costs** – What are the costs to attend? (tuition, room, board, books, etc.) What kinds of financial aid are available?

**Campus Life** – What is it like? (setting, location, residential or commuter) What did you notice about the housing? What clubs, sports, activities might be of interest to you there? If you met students, what did they have to say about the college?
Unit Culminating Task:
Reflect on the College Visit: Visual Presentation

Purpose
The purpose of this lesson is to do final preparations for a reflective essay in which students describe their impressions and compare and contrast what they learned about two colleges during their visits.

Suggested Grade Level:
11

Materials and Handouts
Comparison of Colleges

Approximate Time Needed:
100 minutes

Student-Facing Instructions
As part of your College Exploration Visit, you used technology to document your experience. You took pictures, captured audio, made a video, and collected informational materials. Your job now is to tell the story of your college visit through creating a digital story. Digital storytelling is the art and science of using various technology tools (smart phones, cameras, computers, tablets, etc.) to tell stories. Like putting together a puzzle, your team will work collaboratively to put these artifacts together to tell the story of what the college visit was all about for you.

In teams of 3-4, create a digital story that communicates what you learned during your College Exploration Visit. Combine pictures, videos, audio, maps, and reflections to create a 3-5 minute digital story which you will present to [underclassmen][parent group][community members][pathway teachers][advisory board][school counselors/administrators]. You may use any technology resource to create your digital story; use the links attached to this task to explore the world of available tools and view examples to help your team tell your story.

Student Product Option 2: In the case that there is no or limited access to technology, students may substitute a poster story board and script for assessment.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Notes

There are three options for this culminating task: a written reflection, a visual presentation, and an oral presentation, or any combination of the three.

Unit Culminating Task Prerequisites - Completion of the following lessons beforehand:
“Why Visit Colleges?”;
“Prepare for the College Visit: College Research Worksheet”;
“Prepare For Your Own College Visit”.

Assessment

Culminating Assessment: Experience/Understanding reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
• Review prior learning for a broader perspective about educational or life events
• Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes assessed in visual presentation:
• Presents perspective with supportive evidence
• Uses digital media/visual displays to engage and support audience understanding

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
As part of your College Exploration Visit, you used technology to document your experience. You took pictures, captured audio, made a video, and collected informational materials. Your job now is to tell the story of your college visit through creating a digital story. Digital storytelling is the art and science of using various technology tools (smart phones, cameras, computers, tablets, etc.) to tell stories. Like putting together a puzzle, your team will work collaboratively to put these artifacts together to tell the story of what the college visit was all about for you.

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## Unit Culminating Task:
### Reflect on the College Visit: Oral Presentation

### Purpose
The purpose of this lesson is to do final preparations for a reflective essay in which students describe their impressions and compare and contrast what they learned about two colleges during their visits.

### Suggested Grade Level:
11

### Materials and Handouts
Comparison of Colleges

### Approximate Time Needed:
100 minutes

### Student-Facing Instructions
As part of your College Exploration Visit, you used technology to document your experience. You took pictures, captured audio, made a video, and collected informational materials. Your job now is to tell the story of your college visit through creating a digital story. Digital storytelling is the art and science of using various technology tools (smart phones, cameras, computers, tablets, etc.) to tell stories. Like putting together a puzzle, your team will work collaboratively to put these artifacts together to tell the story of what the college visit was all about for you.

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Student Product Option 2: In the case that there is no or limited access to technology, students may substitute a poster story board and script for assessment.

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Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Notes

There are three options for this culminating task: a written reflection, a visual presentation, and an oral presentation, or any combination of the three.

Unit Culminating Task Prerequisites - Completion of the following lessons beforehand:
“Why Visit Colleges?“;
“Prepare for the College Visit: College Research Worksheet“;
“Prepare For Your Own College Visit“.

Assessment

Culminating Assessment: Experience/Understanding reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes assessed in oral presentation:
- Presents perspective with supportive evidence
- Organizes presentation in a way that supports audience understanding
- Demonstrates command of appropriate body language and speaking skills
- Employs language appropriately and fluidly
- Responds directly and effectively to audience questions

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

As part of your College Exploration Visit, you used technology to document your experience. You took pictures, captured audio, made a video, and collected informational materials. Your job now is to tell the story of your college visit through creating a digital story. Digital storytelling is the art and science of using various technology tools (smart phones, cameras, computers, tablets, etc.) to tell stories. Like putting together a puzzle, your team will work collaboratively to put these artifacts together to tell the story of what the college visit was all about for you..

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Theme: Building a College Success Network
Learn About Networks and Their Value
Why Go to College?

Purpose
The purpose of this lesson is to expose students to multiple experiences of first-generation college-bound students and to have them reflect in writing on what resonates with them as the purpose of going to college.

Suggested Grade Level:
10

Approximate Time Needed:
Two 50 minute sessions

Materials and Handouts
Why Go To College, Anyway?
Readings

Student-Facing Instructions

Part 1:
In pairs, read one of the three passages about high school students who would be the first in their family to go to college. One of you will read the passage aloud to the other and you both will think of 2-3 things the person you read about need (or needed) to do to make college a viable option. Whoever does not read out loud will be the “recorder” and make note of the ideas you come up with to share with the class.

Part 2:
Think about all the reasons you’ve been told that it’s important to continue your education after high school -- in a 2-year community college, 4-year college or university, or a technical or trade school. Write down as many reasons as you can think of to the question, “Why go to college?” on your handout.

Part 3:
Interview someone who was the first in their family to go to college and ask them to tell you about their experience. Take notes on what they share.

Part 4:
Write an essay in response to the question: Why Go to College?

Use your notes from the readings, your own list of reasons as to why to go, and your notes from your interview. Be sure to write a claim that describes your opinion, use evidence from these three resources to support your claim, and write a conclusion that analyzes your thinking and reasoning.

Adapted from the Grade 10 College Readiness: What is College? Myths & Facts workshop
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Formative Assessment

Argumentative essay aligned to quality criteria:

Student Learning Outcomes assessed in this task:

- Develop an argument and draw meaningful connections and conclusions
- Organize and structure argument consistently and logically
- Review prior learning for a broader perspective about educational or life events

Optional Student Learning Outcomes:

- Demonstrates command of standard English conventions
- Skillfully uses written language to convey ideas and understanding
**Instructions**

**Part 1:**
In pairs, read one of the three passages about high school students who would be the first in their family to go to college. One of you will read the passage aloud to the other and you both will think of 2-3 things the person you read about need (or needed) to do to make college a viable option. Whoever does not read out loud will be the “recorder” and make note of the ideas you come up with to share with the class.

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Write an essay in response to the question: Why Go to College?

Use your notes from the readings, your own list of reasons as to why to go, and your notes from your interview. Be sure to write a claim that describes your opinion, use evidence from these three resources to support your claim, and write a conclusion that analyzes your thinking and reasoning.
Making Your Map

How to find information and set your sights on college

Aileen Rosario had all she could do just to survive eleventh grade. Her family had just moved to New Jersey and she had not yet found friends at the huge Paterson high school. Having fallen behind the year before, she had to take extra courses if she was going to graduate with her class. Her older sister, always her closest companion, had just quit school and was no longer there to support her.

To make things worse, Aileen couldn’t seem to get the attention of the school guidance office. She worked hard and got on the honor roll, but no one ever talked about going to college. She didn’t know that she should take the SAT before applying, let alone how to sign up for it.

Although Aileen’s parents liked the idea of her attending college, they didn’t have much idea about what it would involve. “I couldn’t talk to anybody in my house, because nobody knew,” she says. “They were just like, ‘Oh, whatever college you go to it doesn’t matter. You could go to a trade school if you want.’”

By the end of her junior year, Aileen realized that she would have to keep her eyes open, knock on doors, and ask a lot of questions. Through a high school business course, she signed up for three weeks of summer enrichment classes at a nearby college and lived in the dorms there. She felt shy and desperately homesick, but the experience gave her insight into what she wanted: a college where she could live at home and commute.

Some students find themselves showered with information about how to get to college. Many others, like Aileen, have to rely on their own courage and determination to obtain the facts they need. In this chapter, they tell their stories of how they did that, and give you their advice on what to try, to get the support you need.
Stand up for Your Education

How to defy stereotypes and low expectations

Stephanie Serda’s family did not interfere with her plans to go to college, but they didn’t expect it, either. Now that she is at a state university in Ohio, she worries about whether her two younger brothers will be prepared to follow in her footsteps. Because her brothers started out on the non-college track, she thinks, they may not have the chance to take challenging courses that will get them ready for college.

I really want to see them come to college and it’s hard for me to not pressure them. I know my parents don’t pressure them at all, because they didn’t pressure me. So I encouraged them and pushed them a little.

I was telling them, ‘Come on, guys, just study harder, ‘cause if you do good in those classes, they’ll put you back up into regular or college prep classes. - Stephanie

Stephanie is right to worry. If you want to go to college right from the start you have to raise your voice, ask for what you need, and keep your eyes open about what classes and opportunities your high school offers you. Somebody may have stuck a “non-college” label on you because of your previous grades, or because of stereotypes about your background, your skin color, or your interests.

You do not have to accept those negative labels. On the contrary, many colleges will value the fact that you have the courage and strength to go after your goals without the resources that many students take for granted. If you make good choices and stand up for yourself, you can go after the preparation you need. In this chapter, students share their stories of how they fought for their education -- and they give you ideas of how to do so yourself.
Support Networks

How friends, parents, teachers and others can help

Ever since he was a young boy, Eric Polk had his head in a book. Even his friends who hung out on the streets of East Nashville told him that he would go to college one day, without a doubt. When they went off to party, they called his mother to make sure Eric went home instead of getting in trouble.

Those friendships were just some of the relationships that supported Eric’s progress at home, at school, and after school. His great-aunt Rachel talked him through an emotional breakdown in his tenth-grade year. His English teacher, Miss Quick, took his questions and his academic ambitions seriously. And at his internship with a community nonprofit organization, his two supervisors became like father and brother to him, coaching him into a leadership role out in the world.

Now that Eric has actually made it to Wake Forest University, he often thinks of how each of these people helped him to get there—by believing in him, encouraging him, and holding out opportunities for him to expand his horizons. They connected him into a network that keeps on supporting him through his hard times and celebrating his successes.

I am below the poverty level and I’m gonna need help! Across all lines, you never know who can help you - and later on in life, they can still help. If you shut out people, you’re going to be by yourself, and you don’t want to be by yourself. Network, learn, connect, and talk to people. Tap into some of those resources, because they are resources! Then the better off you’ll be. You can’t go through high school staying to yourself -- colleges these days are looking for well-rounded people, so get out of the shell, put yourself out there. - Eric

Your world, too, may already contain many people who can help you along the road to college. Finding and reaching out to them may be the most important thing you can do during your high school year.
Purpose
The purpose of this lesson is for students to understand the importance of building a support network.

Suggested Grade Level:
10

Materials and Handouts
College Board Big Future: Building Support Network

Approximate Time Needed:
30 minutes

Student-Facing Instructions

Take notes on who mentors and role models often are and brainstorm a list of possible role models and mentors that you already have or could have.

Assessment
Completion of notes and brainstorm.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.

Take notes on who mentors and role models often are and brainstorm a list of possible role models and mentors that you already have or could have.
Building a Support Network

Where should you look for role models?

Roberto Suarez, Guidance Counselor, Homewood-Flossmoor High School

Working with Your High School Counselor for College Success

From advice on classes to college applications, see how your school counselor can help you navigate high school and get ready for college.

Read article

The Scoop: What’s a Mentor and How Do I Get One?

A mentor can help you make decisions about your future. But where do you find one? College students and experts offer advice and share their stories.

Read article

Who can help if your family can’t guide you?

Aida Engelstad, M.Ed., JTED/Career/Post-Secondary Counselor, Palo Verde High Magnet School

20 Questions to Ask Your School Counselor

How can you get the right advice about college from your high school counselor? These questions will help you get the conversation started.

Read article

Neither of my parents went to college

Jonathan O., college junior

STUDENT STORY

My counselor pushed me to reach my goal!

Milena, college senior

HOW TO FIND AN INTERNSHIP YOU’LL VALUE

What’s the benefit of an internship — and how do you get one? Get advice and read what students say they got out of their internships.

Read article
Build Your Own Network
First in the Family: Build Relationships

Purpose
This activity gives students a chance to share their own important life experiences, practice listening skills, and learn about their classmates.

Suggested Grade Level:
10

Materials and Handouts
Worksheet: Build Relationships
First In the Family: Build Relationships
First In the Family: Spread Your Wings

Approximate Time Needed:
1 week

Student-Facing Instructions
Read the “Build Relationships” and “Spread Your Wings” pages of First in the Family website:
http://www.firstinthefamily.org/highschool/Build_relationships.html
http://www.firstinthefamily.org/highschool/Spread_your_wings.html

Follow the “Finding a Mentor” suggestions (on the Build Relationships page):

1. Tell everyone you know you plan to go to college. Ask people you trust and admire if they can help—it could be a religious leader, a coach, an employer, a family friend, a godparent.

2. Make a short list of the teachers you respect (from middle school, too). Send them a note—or an e-mail—explaining where things stand with your college plans and asking them if they can advise you when you need help.

3. Look for “college access” programs in your community, designed to give students the one-on-one support that’s hard to find in school. These can be after-school or summer programs as well. Contact them to find out if these are programs you could join.

Complete the Build Relationships worksheet.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Resource

Teacher Notes
While not required, this lesson will be richer if students have already completed the lesson titled “Why Build a Support Network” in the “Learn About Networks and Their Value” unit.

Assessment
Completion of worksheet.
Instructions

Read the “Build Relationships” and “Spread Your Wings” pages of First in the Family website:

http://www.firstinthefamily.org/highschool/Build_relationships.html
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Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
### Build Relationships

1) Tell everyone you know you plan to go to college. Ask people you trust and admire if they can help—it could be a religious leader, a coach, an employer, a family friend, a godparent.

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<tr>
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<tr>
<th>Name of Program</th>
<th>Phone Number</th>
<th>Contact Person</th>
<th>Description of Program</th>
<th>Are you interested in joining? Why/Why not?</th>
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123
Build relationships

You get a huge boost if there’s an adult you can count on for help in making it to college. Way too many of the students we surveyed—28 percent—said they completed their college application on their own. It’s hard to get the attention of overloaded counselors and teachers, they said. And even supportive families may not be able to offer concrete help, especially if no one in the family has been to college.

The value of these relationships cannot be overstated.

“My health science teacher, she’s down to earth. She connects with you—outside of school, inside of school, she’s there. She’s a great influence on what you would like to be when you grow up, cool and relaxed but still professional.” — Ashley

“I’m a participant in our local university’s ‘Dream Project’ that comes here on Thursdays. It’s a really great resource in that they assign you a student who’s in college, so they know what it’s all about. They come here and guide students through every step. I am lucky to be able to participate in something like that.” — Duron

“My coaches have made the difference. My parents want me to go to college bad, but they can’t really help. But if you’re a high school athlete like me, you’re used to being pushed. Your coaches push you hard on the field, and they push you to college, especially when they have ties at a lot of places. They push you, and it’s a good thing.” — Caleb

“I usually don’t like asking for help, but when someone comes up to you, even just a counselor, and says, ‘Hey, check this out, I don’t know if you’ll like it, but you should look at it anyway,’ that goes pretty far. Having someone working with you without you asking for it, that means a whole lot.” — Dejahayne

Sadly, there aren’t enough adults who think of reaching out to help young people make it to college. So it’s up to you to make the connections and build the

Finding a mentor

Tell everyone you know you plan to go to college. Ask people you trust and admire if they can help—it could be a religious leader, a coach, an employer, a family friend, a godparent.

Make a short list of the teachers you respect (from middle school, too). Send them a note—or an e-mail—explaining where things stand with your college plans and asking them if they can assist you when you need help.

Look for “college access” programs in your community, designed to give students the one-on-one support that’s hard to find in school. Ask if they have a list of such programs, or look online at http://bit.ly/1kUPZN4

Students on who makes a good mentor

“Someone who shows us different paths and different opportunities, based on our interests.”

“Someone who puts themselves in our shoes and sees what we go through. It’s great if they listen, but better yet if they understand us.”

“Someone who really knows you and where you want to go in life. Someone you can trust and talk to and who really wants to help you out, who knows your
Spread your wings

"My afterschool program has given me the opportunity to see a new world, not just going home, doing chores, taking care of kids, helping my mom. It allows me to be creative, to explore, to imagine something different for myself." - Chandra

"Youth in Action, it's my second home. I've learned about issues like school reform and violence prevention. I've lobbied City Hall. I've grown so much by being here." - Esan

Over 70 studies suggest that students who participate in afterschool and summer programs have a leg up, when it comes to college. They get a chance to excel outside the classroom, develop interests and talents, learn teamwork and competition, practice leadership, and contribute to their community. Students often find their passion in these out-of-school programs. It's also a good way to build relationships with caring adults. And it can be just plain fun.

Most communities offer a range of afterschool and summer programs. The Y and Boys & Girls Clubs are growing new programs for teens that are worth a look. There are small nonprofits where you can make art, learn video, practice spoken word, and more.

For low-income students, the federal government offers several academic enrichment programs. Upward Bound may be the best known.

And there are always volunteer opportunities.

Unfortunately, school counselors and teachers often don't know much about afterschool and summer programs. Still, try to enlist a teacher or counselor's help: tell them what you have in mind and ask them to see what opportunities they can uncover. Or recruit a group of friends and create your own list of:

Some leads

Go online to look up local YMCA, Boys & Girls Club, 4-H (if you're not in a big city) to see what they have to offer.

Find out if there's an Upward Bound summer program near you. Google "Upward Bound + [where you live]"

Google:
“youth programs + [where you live]"
“summer camps + [where you live]"
“volunteer opportunities for teens + [where you live]"

See what's listed for your location on the national directory of college access programs:
www.collegeaccess.org/accessprogramdirectory

Call your local United Way, and ask to speak with someone who knows about afterschool and summer programs for teens.

Find out if your city or town has a community foundation. If so, follow the same directions as for the United Way.

Ditto for calling a member of your town or city council.

Note: In all three of these cases, the very fact that you called may alert community leaders to the need for more outreach.
Unit Culminating Task:
Building Relationships Reflection

Purpose
The purpose of this lesson is for students to synthesize, reflect and act upon building college-support relationships.

Suggested Grade Level:
10

Materials and Handouts
First In the Family: Build Relationships
First In the Family: Spread Your Wings

Approximate Time Needed:
50 minutes

Student-Facing Instructions
Write a reflective essay about your progress in building relationships. In your reflection, address the following:

1. What specific actions did you take to build relationships and find mentors? (Who did you contact, when, and how? What did you tell them or email them?)
2. What responses did you get from the people and programs you reached out to?
3. How did you follow up with those responses?
4. What new information did you learn?
5. How do you feel about the action you took to build relationships?
6. Did anything surprise or disappoint you?
7. What specific next steps are you going to take and how will you accomplish them?

Teacher Notes
Unit Culminating Task Prerequisites: Completion of “Why Build a Support Network” and “First in the Family: Build Relationships”.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Growth/Personal reflective essay assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions
Instructions

Write a reflective essay about your progress in building relationships. In your reflection, address the following:

1. What specific actions did you take to build relationships and find mentors? (Who did you contact, when, and how? What did you tell them or email them?)
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Note: In all three of these cases, the very fact that you called may alert community leaders to the need for more outreach.
### Purpose

The purpose of this lesson is for students to compile and share resources and opportunities that may assist with college preparation.

### Suggested Grade Level:

10

### Materials and Handouts

First In the Family: Build Relationships
First In the Family: Spread Your Wings

### Approximate Time Needed:

Varies

### Student-Facing Instructions

Now that you have begun building relationships to support you in your preparation for college and researched college access, after-school or summer programs in your community, you will work with your group to compile your resources and create a flyer or poster presentation to share with the rest of your school.

Your product should include the following (and may require that you re-connect with the programs in order to fill in all the details):

- At least 4 college-access, after-school or summer organizations
- Name of organization, address and contact information
- Short description of the program offered
- Who would benefit from this program
- Grade level requirements
- Application details and deadlines
- Cost or scholarships available, if applicable
- A quote from a student or mentor in the program that sums up why it’s a useful program.

### Teacher Notes

Unit Culminating Task Prerequisites: Completion of “Why Build a Support Network” and “First in the Family: Build Relationships”.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Flyer/poster assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Presents a perspective with supportive evidence
- Uses digital media/visual displays to engage and support audience understanding

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
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Utilize Network to Expand Resources and Opportunities
# Your Success Network in College

## Purpose
This lesson exposes students to real struggles in college and has them prepare to set up their own success network in college.

## Suggested Grade Level:
12

## Materials and Handouts
- The Atlantic: The Added Pressure Faced by First Generation
- First Generation Student: Networking in College
- First Generation Student: You’re Not Alone, How to Find Support While In College

## Approximate Time Needed:
2 Class Periods

## Student-Facing Instructions

### Part 1:
1. Read the article: First-Generation College-Goers: Unprepared and Behind
   (http://www.theatlantic.com/education/archive/2014/12/the-added-pressure-faced-by-first-generation-students/384139/)
2. As you read, note 4 things that strike you, resonate with you, or that you have questions about.
3. Refer to these notes during a Socratic discussion with your classmates.
4. After your class discussion ends, answer: What new insights or questions do you have now?

### Part 2:
1. Next read these two articles:
   - http://www.firstgenerationstudent.com/blog/networking-in-college/
2. Write a one-page reflection based on the readings and class discussion. Be sure to address the following:
   - Why is it important to build a success network once you’re in college?
   - Describe the network and resources you have already started building.
   - In what ways are you prepared to expand your resources once you start college?
   - What specific next steps do you have and how do you plan to achieve them?
   - What supports do you need now to get started?

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Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Notes

This lesson includes a class discussion. While a Socratic seminar style discussion is recommended, use whatever kind of discussion format works best with your students.

Formative Assessment

Growth/personal reflection aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Part 1:
1. Read the article: First-Generation College-Goers: Unprepared and Behind (http://www.theatlantic.com/education/archive/2014/12/the-added-pressure-faced-by-first-generation-students/3ϴ4139/)
2. As you read, note 4 things that strike you, resonate with you, or that you have questions about.
3. Refer to these notes during a Socratic discussion with your classmates.
4. After your class discussion ends, answer: What new insights or questions do you have now?

Part 2:
1. Next read these two articles:
   http://www.firstgenerationstudent.com/blog/networking-in-college/ and
   http://www.firstgenerationstudent.com/succeed/youre-not-alone-how-to-find-support-while-in-college/
2. Write a one-page reflection based on the readings and class discussion. Be sure to address the following:
   • Why is it important to build a success network once you’re in college?
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   • In what ways are you prepared to expand your resources once you start college?
   • What specific next steps do you have and how do you plan to achieve them?
   • What supports do you need now to get started?
First-Generation College-Goers: Unprepared and Behind

Kids who are the first in their families to brave the world of higher education come on campus with little academic know-how and are much more likely than their peers to drop out before graduation.
Your Network is Your Net Worth: Using Your Network to Succeed in College

Posted April 9, 2015

When I was growing up, my parents would often tell me that I needed to go to college to have an opportunity at a better life. That made sense to me. My parents didn’t graduate from high school and worked service jobs. College was my opportunity to help my family become financially stable and realize the American Dream.

I was fortunate to get a full-tuition scholarship to Pomona College, one of the premier liberal arts colleges in the nation. Things changed once I got to college; I hit a wall. I had focused all of my time on getting into college and never really thought about how to navigate college.

If you find yourself in this place, trust me, you are not alone. This is where I found the power and value of networks.

After my first semester, I wanted to go home and get away from Pomona. While many of my friends talked about working in a research lab or interning at a bank or tech company, I was happy to know that I survived my first semester of college and wanted to stay at home all summer. Never in my life had I gotten C’s before, and it was difficult to understand why I was struggling in college.

Midway through my second semester, I picked up the phone and called one of my college advisors. I vented to him about how difficult college courses were and how I didn’t know how to look for a summer opportunity. In a whim, he put me in contact with one of his co-workers. I worked with her to discuss how to find a research opportunity for the summer and how to ask my professors for help with my courses.

I needed that extra help and guidance in college.

College shifts the responsibility of education from the teacher and institution to the student. You are in charge of educating yourself and making sure that you are getting what you need. You are no longer meeting with your teachers daily and building that relationship with them.

People ask me how is it that I was able to go from an inner-city high school to intern at Google and the White House, complete a Fulbright fellowship, and now work for FWD.us. I was able to get these
You’re Not Alone! How to Find Support While in College

Article Summary

What kind of advice or support is available at college?
Many organizations are there for you. There is help for managing classes and time, dealing with emotions and family or health problems, and cultural or anxiety issues.

Where can I get help?
Student services, college counselors, peer study groups and even professors can give you support and advice.

What can other students do for me?
They are probably struggling with the same things you are, and many heads are often better than one. Studying is especially productive with a good study group.

Can a professor understand me?
A sympathetic professor has already been through the college experience, and has probably helped others before you. Give one a try.

What if my college doesn’t have the right help for me?
Look for local chapters of national/state organizations for college access and success. Read the article below for more information.
Theme: Path to College
My Graduation Plan
**Purpose**

In this activity, students learn about challenges high school students can face and the consequences of those challenges. This sets the stage for setting their own goals that will help them be successful in high school.

**Suggested Grade Level:**

9

**Materials and Handouts**

Example Cornell Notes
Reading School Challenges
Reading Practice Setting Goals

**Approximate Time Needed:**

50 minutes

**Student-Facing Instructions**

**Part 1:**
Read “Reading: School Challenges” and take Cornell Notes as you read. After reading, discuss the following questions:

- What challenges did these students face?
- What options did they have to deal with their challenges?
- How did they end up dealing with their challenges?
- What influenced the decisions that they made?
- What were the outcomes of their decisions?
- What kinds of support did they get?

**Part 2:**
Using the handout “Reading and Practice: Setting Goals”, read about goal setting and set goals for yourself.

**Part 3:**
Now that you’ve written goals for yourself, write a reflective paragraph in which you:

- State your revised goal
- Explain why this goal is important to you
- Describe what challenges you foresee in accomplishing your goal
- Explain what your plans are in overcoming these challenges

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Teacher Resource

**Formative Assessment**
Growth/personal reflective paragraph aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
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Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
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## Example: Cornell Notes

**Make It Local |** The example notes are based on the presentation on truancy. Modify the notes based on your changes to the presentation (Teacher Resource 9.3). Then remove this callout and re-save the file before distributing it to students.

<table>
<thead>
<tr>
<th>Name: Jose del Campos</th>
<th>Date: January 12, 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher: Ms. Hwang</td>
<td>Class: Plan Ahead</td>
</tr>
</tbody>
</table>

### Topic

**Truancy**

<table>
<thead>
<tr>
<th>Questions/Main Ideas</th>
<th>Notes</th>
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</thead>
<tbody>
<tr>
<td>What does “truancy” mean?</td>
<td>Missing school without permission</td>
</tr>
<tr>
<td>Why is it a big deal?</td>
<td>Kids who cut school a lot are more likely to drop out (3 out of 4).</td>
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<td></td>
<td>Dropouts -- more likely to be in jail (75%) or murdered (94%).</td>
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<tr>
<td></td>
<td>It’s actually a law that kids are supposed to be in school.</td>
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<tr>
<td>Why does it matter if I’m late for class?</td>
<td>If you're more than 30 minutes late, that’s a “tardy.”</td>
</tr>
<tr>
<td>Questions/Main Ideas</td>
<td>Notes</td>
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<tr>
<td>3 tardies = 1 unexcused absence</td>
<td></td>
</tr>
<tr>
<td>3 unexcused absences = legal definition of being “truant”</td>
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<tr>
<td>What happens if a kid is truant?</td>
<td>Parents can get in trouble.</td>
</tr>
<tr>
<td>Parents may have to pay fines or go to jail.</td>
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</tr>
<tr>
<td>The D.A.’s office prosecutes parents of habitual truants.</td>
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</tr>
<tr>
<td>What happens if a parent goes to truancy court?</td>
<td>They can work with the district and court, plead guilty and pay a fine, or plead not guilty and present their case in court.</td>
</tr>
<tr>
<td>What happens if they work with the District?</td>
<td>They have to participate in a Parent Responsibility Plan to help their kid get back on track with school.</td>
</tr>
<tr>
<td>What if they plead guilty?</td>
<td>They pay a fine and it goes on their criminal record.</td>
</tr>
<tr>
<td>Does anything happen to the student if they’re truant?</td>
<td>Older students (like us) face consequences.</td>
</tr>
<tr>
<td>Consequences include fines, community service, and losing your driver’s license (or delaying getting it).</td>
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</tbody>
</table>
Summary

Being truant is a big deal. Kids who are frequently truant are more likely to drop out, and drop outs are more likely to end up in jail or even dead. Truancy also includes being late for class a lot (30 or more minutes late). If a kid is truant, the parents can get into trouble with the D.A. and have to go to court. They may have to pay fines or even go to jail. Kids who are truant can have to pay fines, do community service, or lose or delay their chance to get a driver's license.
Reading: School Challenges

Reuben

“I was never a good student,” Reuben says. “I don’t remember a teacher ever saying something nice about me. I didn’t act up or anything, but I just wasn’t into school. I got bored real fast. After classes were over, I hung out and roamed around the city with my friends. I never did homework. And I didn’t read well—I got held back in sixth grade because my teacher said I couldn’t read at all. I could, but it took so long that I usually just gave up.”

By the time Reuben’s family moved to this country, Reuben had made a habit out of cutting school. “I must have missed about half my first semester of high school,” he says. Instead he discovered a new talent: basketball. He played for hours every day and got good at it really fast.

One day, Reuben ditched school to go play basketball at the court nearby. But this time he got caught—the basketball coach saw him shooting hoops, right in the middle of the school day. “I thought he was going to call the cops, or at least my mom. But he just wanted to talk.

“He said he wished I was on the team at school. I tried to blow him off and said being on a school team was lame, but he didn’t listen. He said they were raising money to go to a summer program with some NBA players, but the team was still pretty weak. They needed a good point guard—and I would be good at that position. But he said I couldn’t join the team if I didn’t show up for school.

“I told him if I showed up, I’d probably flunk all the tests. He said he had a hard time with school, too, and we started talking about it. He said he had a learning disability, which made it hard for him to read. A lot of what he said sounded like what happened to me.

“I kept skipping school, but Coach would show up more often and bug me about it. He asked me to read something for him and then talk about it. Afterwards, he said he knew somebody who might be able to help me.”

The school basketball team was very successful with their fundraising, and they were almost guaranteed to go to that NBA workshop. “Coach told me if I met with this lady after school and did some tests, he might be able to get me on the team. So I went.”

The lady was a learning specialist. Reuben was diagnosed with dyslexia and several other learning differences. “The lady explained that there were things I could do differently to help with my reading and other schoolwork. I got extra time to do my assignments, and they got a tutor who met with me during study hall. School still wasn’t much fun, but I was able to keep up with my classes better. And Coach got me on the basketball team, so that helped.

“Now I’m in my senior year of high school. I wouldn’t say I love school, but it’s gotten better. I had to take summer classes to catch up on the stuff I missed, but next year I’m going to go to community college. I’m going to help pay for it by helping to coach a summer basketball camp.

“Where I come from, people don’t get tested and teachers don’t try to get through to kids like me. I know lots of people who dropped out of school. Coach was the only one who showed me a different way to go. Maybe I can do that for somebody else someday.”
Sarah

“I already have more education than anyone else in my family,” Sarah says, “and I’m only a sophomore in high school.” Sarah’s parents and grandparents run a small restaurant. “My mom quit school as soon as she could, to help her parents run the restaurant. My dad grew up in another country where there was a lot of violence, so he almost never went to school there, and by the time he got to America, he was already old enough to work.”

Sarah’s parents sent her and her older brother to school, but they were usually too busy to help them much with their homework. Sarah was a pretty good student, but her older brother was too wild to do well in school. “He got into trouble really early and had to spend time in juvenile hall. Once he got out, he went right back to his old friends and got in trouble again.”

Last year, her brother was arrested again—and convicted. He’s an adult now, so it’s a prison sentence of at least five years. “My parents are angry, but they’re also worried. They were hoping my brother would start behaving himself better. They needed his help with the restaurant. Now that’s he gone, they’ve started depending on me. Since they didn’t go to school very much, they don’t see what the big deal is.

“I mean, this is my family’s business, so they say I should just start working in it now and someday I’ll own it. Owning a business is fine and everything, but I don’t want to spend my whole life in the restaurant. But what can I do? My parents get me up in the morning and take me straight to the restaurant. Sometimes I could sneak out to go to class, but my dad and grandparents don’t speak much English, so they want me to stay around to take people’s orders or answer the phone. I’ve been absent so much the school marked me as a dropout. I’m not even sure they’ll let me back in if I went to class now. I don’t know what to do.”
Brittany

"I did pretty well in school," Brittany said. "I liked English class—I like to read and I enjoyed writing poetry, although essays were kind of a pain. Math was the worst, but at least the teacher was cool."

Brittany got okay grades, but outside of school, things weren’t going well. Brittany’s mom worked two jobs to pay the bills, and her dad wasn’t around much. After school, Brittany could pretty much do what she wanted, and she did. In her sophomore year, she started dating a guy who ran with one of the local gangs. “I knew he had a bad rep, but he was sweet to me,” she says. “He took me out and gave me presents.”

Brittany found out she was pregnant only a few days before her 17th birthday. “I was freaked out. I knew my mom would be really mad at me, and I wasn’t sure how my boyfriend would feel. At first, I didn’t even think about school.”

Brittany’s mom was angry, but agreed to help her figure out how to take care of the baby. Her boyfriend said he was okay with it, but he didn’t spend as much time with her as he used to. “By the time I was six months pregnant, I almost never saw him,” Brittany says. “Then my friends told me they saw him at the movies with another girl.” Brittany knew she would have to raise her baby without his help.

“I went to school as long as I could,” Brittany said. “But I didn’t finish junior year.” In fact, Brittany’s daughter was born the same weekend as the school’s junior prom. “All my friends were out partying—they didn’t even find out I had the baby till a couple of days later.”

“I wanted to go back to school, but I couldn’t figure out how to do it. My mom needed both jobs even more now, because she was paying for the baby, too. And a baby takes a lot of attention—somebody has to be with her all the time. I couldn’t afford to send her to a day care or anything, so I just stayed home with her. Some of my friends thought it was cool—they thought I sat around and watched TV all the time, but it wasn’t like that. I had a lot of work to do around the house, just trying to take care of the baby. She cried a lot, and I didn’t get much sleep for the first six months or so. Honestly, it was easier going to school.”

Brittany missed most of her senior year staying home to take care of the baby. One day she was out buying diapers when she saw someone she knew. Sofia had been a year ahead of her in school. But Brittany was surprised to see Sofia shopping in the diaper aisle with two kids—a baby in a stroller and a little boy who was running up and down the aisle. Sofia remembered her and the two of them started talking.

It turned out that Sofia had also dropped out of school when she got pregnant with her first child. “But I thought you graduated,” Brittany said. “Didn’t I see you at the ceremony?”

“Yeah, I got to graduate. My dad found this program that helps young mothers. This organization runs a day care center, and the price is really low. But they won’t take your kids unless you can prove you’re going to school full-time, and you have to take these classes on the weekend about how to be a good mom. I managed to graduate from high school and I signed up to take classes to be a medical assistant. I had to drop out of that program when my daughter was born, but I’m going back soon, and I’m going to use that same day care program again.”

“That sounds great,” Brittany said. “Could I sign up for something like that?”

“Sure. I’m leaving my kids there tomorrow so I can meet with my advisor at the junior college. Want to come along? I’ll introduce you to the woman in charge.”
The next day Brittany met the women who run the day care center. She got her daughter signed up for day care, and soon she was back in school again. “It was weird, going back to school after so much time off,” she said, “and I don’t get to do anything fun, like go to dances or stuff like that. I have to spend time with my daughter and I’m signed up for these parenting classes on the weekend. But I’m on track to graduate in the spring, only a year behind my classmates. And I’m talking to Sofia about her medical assistant classes. I’m not sure if I want to do that or not, but I know I’ve got to get a good job so I can take care of my daughter.”

Marcus

“My mom did drugs for pretty much my whole life,” Marcus said. “My grandma raised me and my little sisters, because sometimes my mom would be fine, but other times, she was really messed up. Grandma worked really hard to help us in school and keep us on a good path. I tried to do well in school, but it was hard to concentrate. My mom would show up every few months and say she wanted us back and she and my grandma would get in loud arguments. Sometimes I stayed up all night, listening to them argue and trying to calm down my sisters. They were scared of my mom.”

But things got even worse when Marcus was nine. “My grandma passed away and we all ended up back with my mom. She was trying to clean up and take care of us, but that didn’t last very long and we ended up in foster care.”

After all this, school seemed pretty unimportant. “I kept going to school for awhile, because that’s what my grandma would have wanted, but I didn’t like it. The foster care people didn’t really care what I did, as long as I didn’t bug them too much, so I started skipping school. At first, I just skipped once in awhile, but the teachers didn’t seem to notice, so I started to ditch more and more. By the time I was 13, I’d pretty much dropped out.”

When Marcus was 15, his mother passed away. “She overdosed,” Marcus says. “I guess I should have seen it coming, but it really shook me up. I’d tried drugs once or twice, but after what happened to my mom, I never did again.”

Marcus decided something had to change. He made an appointment with his foster care social worker. “The social worker talked to me about my mom. He said he knew things had been rough and that maybe I’d made some mistakes, but this was a chance to start over and do things differently. I knew what he was talking about. The counselor helped me transfer to a school in a different neighborhood, so I could get away from some of the people I’d been hanging out with. It was scary to think about making such a big change, but I knew I needed to do it.”

Marcus started going to his new school regularly. “I realized that I could do better in school if I just showed up every day. I went up to some of my teachers and explained a little bit about what happened before. They were pretty nice about it and a couple of them gave me extra assignments I could do to get caught up. I went to an afterschool program that helped me do better, too.” Marcus has finished his first two years of high school and is hoping to earn a 3.0 GPA next year for the first time ever.
Juliana

“My mom got pregnant with me when she was 15,” Juliana says. “She managed to put herself through beauty school and got a job as a hair stylist. She got pregnant again when I was five years old, and again when I was 13. Between the new babies and trying to keep her job, she didn’t have much time for me.”

“I hated school. The lessons were boring. I don’t think the teachers wanted to be there any more than we did. I knew I was pretty smart. I read a lot of books, and I used to get into these great conversations with this older woman who lived in our apartment building. She used to be a lawyer and we’d get into these long talks about politics and stuff. That was interesting. But we didn’t have interesting talks like that in school.

“I have to babysit my little sisters at night when my mom goes out, and she goes out a lot. I didn’t get a lot of sleep and I never got my homework done. I caught up on sleep in my morning classes, and my grades got even worse. The school sent letters home to tell my mom, but I’m the one who picks up the mail, so I just pulled them out before she could see them.”

Juliana was on the verge of dropping out of school when she had an important talk with her neighbor. “She saw me throw out one of the school letters and she asked me about school and how I was doing. I told her all about it: how boring school was, how the teachers were mean, and how I was too tired to care about the stuff they were teaching anyway.

“I thought she was going to argue with me, but she just listened. When I finished complaining, she asked me one question: what did I want to do with my life? I just shrugged—I don’t know what I want to do. She said maybe I needed to think about it. She said she thought I had a lot of potential, but I had to figure out what to do with it.”

That conversation got Juliana thinking. “I hadn’t thought much about a job or life after school. But I don’t want to be like my mom—I know that. I realized that if I just slept through class all the time, I wasn’t getting any more of an education than my mom got. That was kind of scary.”

Juliana knew she had to make a change. “I figured the first thing was to start trying to get more sleep. I talked to my mom about it and she agreed to stay home more often or get someone else to take care of my sisters. Just being awake in class helped me do better on some of my homework, and I started making more time to do it. Now when I get home from school, I do my homework first before I turn the TV on. My neighbor invited me to come over and use her computer when I need it, so that makes it easier to do some assignments.

“I still don’t like a lot of my classes, but this year my history teacher is pretty good. He also runs the debate team after school, and he convinced me to try that. It’s really fun—a lot like the discussions I used to have with my neighbor. We meet after school a couple of times a week to get ready for our competitions, and the teacher has a really strict rule: if you didn’t go to class that day, you can’t come to practice. Sometimes, that’s the only thing that gets me up in the morning—knowing that if I put up with my classes, I get to go to practice after school. But I know I’m going to have to do well in school so that I can have a better life. That’s the most important thing to me right now.”
Reading and Practice: Setting Goals

Student Name: ___________________________ Date: __________________

Directions: Read about goal setting and do the practice questions included in the reading. Examples are provided. You will use this approach to goal setting as you create your Four-Year Action Plan later in this lesson.

Setting Goals: What’s the Point?

No matter how old we are, it’s important to have a vision in mind of how we want our lives to be. Once you picture something you want, you can make a plan to achieve it. Goals can start as distant dreams (to become a doctor, to travel to Africa, to own a business). Or goals can be more like immediate wishes (to get a B in English, to make the basketball team). When you set a goal, you are giving yourself something to work toward and focus your efforts on, and that gives your life direction.

The DAPPS Rule

To really motivate you, a goal needs to have certain qualities. A tool you can use to help you set motivating goals is called the DAPPS rule. DAPPS stands for:

Dated: Motivating goals have specific time frames. Short-term goals are usually one month to a semester; long-term goals might be one year, four years, 10 years, etc.

Practice

A short-term goal is something you can accomplish within this semester.

Examples: I want to make the JV soccer team; I want to get a B on my big science project; I want to get on the honor roll; I want to be in the school play; I want to run for Student Council.

Your turn: write down one short-term goal you could set for this semester:

__________________________________________________________________________

A long-term goal is something you want to accomplish that is a year or more away. For example, all of you have a goal to graduate from high school.

Other examples: I want to go to college; I want to get a job as a veterinary technician; I want to move out of my mom’s apartment; I want to buy a car.

Your turn: write down one long-term goal (besides graduating from high school) you could set for yourself:

__________________________________________________________________________
Achievable: Goals that you find really motivating are challenging but achievable. It’s unrealistic to plan to run a marathon in a month if the only exercise you’ve been getting is lifting the TV remote. It’s more realistic to set a goal to be able to run a mile in a month’s time.

**Practice**

Olivia wants to be the star in the school play. But she’s never been in a play in her entire life! It’s unrealistic for her to expect to get the lead in the next school play. She needs to set realistic, smaller goals that will help her reach her bigger goal. For example, she might set a goal to get any role, even a small one, in the next play. She might set a goal to take a drama class next year. She might join the drama club at her school so she gets practice. These are achievable goals that can help her eventually achieve her big goal of being the star!

Your turn: write down one (or more) achievable goals for yourself. HINT: Achievable goals can be smaller steps to help you achieve one of your long-term goals. For example, if your overall goal is to get on the honor roll before you graduate, one achievable goal might be to raise your GPA this semester from a 2.0 to a 2.5.

_________________________________________________________________

_________________________________________________________________

_________________________________________________________________

Personal: Motivating goals must be meaningful and valuable to you, not someone else. Your relatives might mean well when they talk about how you are going to become a doctor; but if you have no interest at all in becoming a doctor, you will not be motivated to reach this goal.

Positive: Motivating goals focus your energy and thoughts on what you do want, not what you don’t want. Instead of a negative goal “not to fail math,” set a positive goal “to get a B or higher in math.”

**Practice**

Revise these example goals so that they are positive, not negative.

Negative Goal: Not to be the only one of my friends still stuck on the JV team

Positive Goal: _______________________________________________________________

Negative Goal: Not to flunk any of my finals

Positive Goal: _______________________________________________________________
Specific: Motivating goals are specific so that you have definite ways to tell when you meet them. It's not enough to say, "My goal is to do better this semester" or "My goal is to work harder." How will you know you've achieved it? What measureable evidence will you have? To truly motivate you, your goals need to be specific: "I will complete every assignment in math class this semester to the best of my ability and ask for help when I don't understand something" or "I will complete all of my graduation requirements by the end of senior year so that I will receive my high school diploma in 20__." 

Practice
Take one of your goals and revise it so it is more specific.
Example: I want to go to college. Possible revisions: I want to go to Harvard; I want to go to our local community college; I want to go to an SEC school.
Your turn: write down your original goal, and then write down one or more revised versions that are more specific.

Starting with the End in Mind
Travelers use maps to locate their destination and figure out the best route to get there. In a similar way, people who set goals find that sketching out smaller steps, also known as an action plan, helps them to stay focused. If your goal is to graduate from high school, it will help if you create a four-year plan that will show you which classes and tests you will need to take every year in order to meet your graduation requirements.

Having goals doesn’t mean that you can’t change what you want out of life as you grow and mature or that life won't throw you some curveballs, but it does mean that you will always be responsible for your life’s direction.
Preparing My 4-Year Action Plan

Purpose
The purpose of this activity is for students to understand what high school courses and tests are needed to graduate from high school and be eligible for 4-year colleges.

Suggested Grade Level:
9

Materials and Handouts
Planner: Preparing My 4-Year Action Plan

Approximate Time Needed:
50 minutes

Student-Facing Instructions
You are going to create a four-year action plan that will help you achieve your goal to graduate from high school. To help you organize your action plan, complete the following prompts.

Teacher Notes
This follows the lesson titled, “Preparing My 4-Year Action Plan”. This lesson is also California-specific. You may need to tailor the worksheet to your school-, district-, or state-specific requirements.

Assessment
Completion of worksheet: Planner - Preparing My 4-Year Action Plan.

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Instructions

You are going to create a four-year action plan that will help you achieve your goal to graduate from high school. To help you organize your action plan, complete the following prompts.
**Worksheet: My 4-Year Action Plan**

**Purpose**
The purpose of this activity is for students to organize their 4-year plan.

**Suggested Grade Level:**
9

**Materials and Handouts**
Example 4 Year Action Plan
Worksheet 4 Year Action Plan

**Approximate Time Needed:**
20 minutes

**Student-Facing Instructions**
Use the example and information from your planner to complete your Four-Year Action Plan. Note the assessment criteria on the next page to understand how your work will be assessed.

**Teacher Notes**
This follows the lesson titled, “Preparing My 4-Year Action Plan”. This lesson is also California-specific. You may need to tailor the worksheet to your school-, district-, or state-specific requirements.

**Assessment**
Completion of worksheet: 4-Year Action Plan.

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Instructions

Use the example and information from your planner to complete your Four-Year Action Plan. Note the assessment criteria on the next page to understand how your work will be assessed.
# Example: Four-Year Action Plan

Make It Local | Modify the action plan based on graduation requirements for your school or district; then remove this callout and re-save the file before distributing it to students.

**Student Name:** Melavia Stravinski  
**Date:** November 15, 2012

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<tr>
<th>Course/Activity</th>
<th>9th Grade</th>
<th>10th Grade</th>
<th>11th Grade</th>
<th>12th Grade</th>
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<tbody>
<tr>
<td>English (&quot;b&quot;)</td>
<td>English 9</td>
<td>English 10</td>
<td>American Lit.</td>
<td>European Lit.</td>
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<tr>
<td>Math (&quot;c&quot;)</td>
<td>Geometry (Hon.)</td>
<td>Adv. Alg. (Hon.)</td>
<td>Statistics (AP)</td>
<td>Calculus (AP)</td>
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<td>Biology Hon.</td>
<td>Chemistry (Hon.)</td>
<td>Environmental Science</td>
<td>Physics (AP)</td>
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<td>*Modern World (also fulfills g)</td>
<td>US History (AP)</td>
<td>Econ (Fall)</td>
<td>US Gov (Spring)</td>
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<td>Language Other Than English (&quot;e&quot;)</td>
<td>Chinese 1</td>
<td>Chinese 2</td>
<td>Chinese 3</td>
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<td>Visual and Performing Arts (&quot;f&quot;)</td>
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<td>Art 1 (Fall)</td>
<td>Art 2 (Spring)</td>
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<td>Journalism</td>
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<td>Practice PSAT PLAN</td>
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<td></td>
<td>Chinese New Year parade float</td>
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<td>Prom Committee</td>
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**ConnectEd Studios College & Career Plan**

**Purpose**

The purpose of this activity is for students to use the online tool to store, organize, and reflect upon their high school steps to be ready for college. In addition, this lesson helps students prepare for a written reflection and revision of their plan (this unit’s culminating task).

**Suggested Grade Level:**

9, 10, 11 and 12

**Materials and Handouts**

ConnectEd Studios College & Career Plan (requires district access to this feature on ConnectEd Studios)

**Approximate Time Needed:**

20 minutes

**Student-Facing Instructions**

**Grade 9:**

1. In your *ConnectEd Studios College & Career Plan*, start filling out Part 1: Transcript Review. You will enter the courses you’re taking in each a-g subject area now.
   - If you’ve completed your fall semester already, indicate the number of semesters taken, credits earned, and grade received. If you’re still currently in your fall semester, leave these sections blank.

2. Continue to Part 2: *Check Your College and Career Readiness*. You can use your notes from the Preparing My 4-Year Action Plan and My 4-Year Action Plan worksheets to complete this section.

3. Export the data in your College & Career Plan to a PDF, and title it College & Career Plan, Grade 9.

**Grade 10: Fall**

1. Read through your previous years’ College & Career Plan PDFs.

2. In your *ConnectEd Studios College & Career Plan*, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   - Make sure the information you entered for 9th grade is correct
   - Enter your 9th grade spring semester grades and credits earned for each course
   - Enter the courses you’re taking in each a-g subject area now (10th grade)

3. Continue to Part 2: *Check Your College and Career Readiness*. Read through what you wrote last school year (in your PDF). Then update and revise as necessary.

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Teacher Resource

4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 10 - Fall.

Grade 10: Spring

1. Read through your previous College & Career Plan PDFs.

2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   - Make sure the information you entered so far is correct
   - Enter your 10th grade fall semester grades and credits earned for each course

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote previously (in your PDFs). Then update and revise as necessary. You will use this to help with your upcoming Unit Culminating Task: 10th & 11th Grade College & Career Plan: Reflection and Revision.

4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 10 - Spring.

Grade 11: Fall

1. Read through your previous years’ College & Career Plan PDFs.

2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   - Make sure the information you entered for 9th & 10th grade is correct
   - Enter your 10th grade spring semester grades and credits earned for each course
   - Enter the courses you’re taking in each a-g subject area now (11th grade)

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote in previous years (in your PDFs). Then update and revise as necessary.

4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 11 - Fall.

Grade 11: Spring

1. Read through your previous College & Career Plan PDFs.

2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   - Make sure the information you entered so far is correct
   - Enter your 11th grade fall semester grades and credits earned for each course

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote previously (in your PDFs). Then update and revise as necessary. You will use this to help with your upcoming Unit Culminating Task: 10th & 11th Grade College & Career Plan: Reflection and Revision.
4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 11 - Spring.

Grade 12:

1. Read through your previous years’ College & Career Plan PDFs.

2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your actual transcript in order to do the following:
   - Make sure the information you entered for 9th, 10th and 11th grade is correct
   - Enter your 11th grade spring semester grades and credits earned for each course
   - Enter the courses you’re taking in each a-g subject area now (12th grade)

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote in previous years (in your PDFs). Then update and revise as necessary. Remember, you will be working on applications this fall with deadlines coming up soon, so be specific about your goals, timelines, your support network, and your next steps.

4. Export the data in your College & Career Plan to a PDF.

Teacher Notes

This lesson is a suggested sequence for using the College & Career Plan in ConnectEd Studios. The College & Career Plan is also California-specific. You may need to tailor it to your school-, district-, or state-specific requirements. Sequence suggestion:

**Grade 9 Timing:** following completion of Preparing My 4-Year Action Plan and My 4-Year Action Plan

**Grade 10 Timing:** Once during the fall semester and again at the beginning of the spring semester, before completing Unit Culminating Task: 10th & 11th Grade College & Career Plan: Reflection and Revision

**Grade 11 Timing:** Once during the fall semester and again at the beginning of the spring semester, before completing Unit Culminating Task: 10th & 11th Grade College & Career Plan: Reflection and Revision

**Grade 12 Timing:** at the beginning of fall semester

Formative Assessment

Completion of PDF of College & Career Plan

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Grade 9:
1. In your ConnectEd Studios College & Career Plan, start filling out Part 1: Transcript Review. You will enter the courses you’re taking in each a-g subject area now.
   • If you’ve completed your fall semester already, indicate the number of semesters taken, credits earned, and grade received. If you’re still currently in your fall semester, leave these sections blank.
2. Continue to Part 2: Check Your College and Career Readiness. You can use your notes from the Preparing My 4-Year Action Plan and My 4-Year Action Plan worksheets to complete this section.
3. Export the data in your College & Career Plan to a PDF, and title it College & Career Plan, Grade 9.

Grade 10: Fall
1. Read through your previous years’ College & Career Plan PDFs.
2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   • Make sure the information you entered for 9th grade is correct
   • Enter your 9th grade spring semester grades and credits earned for each course
   • Enter the courses you’re taking in each a-g subject area now (10th grade)
3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote last school year (in your PDF). Then update and revise as necessary.
4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 10 - Fall.

Grade 10: Spring
1. Read through your previous College & Career Plan PDFs.
2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   • Make sure the information you entered so far is correct
   • Enter your 10th grade fall semester grades and credits earned for each course
3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote previously (in your PDFs). Then update and revise as necessary. You will use this to help with your upcoming Unit Culminating Task: 10th & 11th Grade College & Career Plan: Reflection and Revision.
4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 10 - Spring.

Grade 11: Fall
1. Read through your previous years’ College & Career Plan PDFs.

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2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   • Make sure the information you entered for 9th & 10th grade is correct
   • Enter your 10th grade spring semester grades and credits earned for each course
   • Enter the courses you’re taking in each a-g subject area now (11th grade)

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote in previous years (in your PDFs). Then update and revise as necessary.

4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 11 - Fall.

Grade 11: Spring
1. Read through your previous College & Career Plan PDFs.

2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your paper transcript in order to do the following:
   • Make sure the information you entered so far is correct
   • Enter your 11th grade fall semester grades and credits earned for each course

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote previously (in your PDFs). Then update and revise as necessary. You will use this to help with your upcoming Unit Culminating Task: 10th & 11th Grade College & Career Plan: Reflection and Revision.

4. Export the data in your College & Career Plan to a PDF and title it College & Career Plan, Grade 11 - Spring.

Grade 12:
1. Read through your previous years’ College & Career Plan PDFs.

2. In your ConnectEd Studios College & Career Plan, go to Part 1: Transcript Review. Refer to your actual transcript in order to do the following:
   • Make sure the information you entered for 9th, 10th and 11th grade is correct
   • Enter your 11th grade spring semester grades and credits earned for each course
   • Enter the courses you’re taking in each a-g subject area now (12th grade)

3. Continue to Part 2: Check Your College and Career Readiness. Read through what you wrote in previous years (in your PDFs). Then update and revise as necessary. Remember, you will be working on applications this fall with deadlines coming up soon, so be specific about your goals, timelines, your support network, and your next steps.

4. Export the data in your College & Career Plan to a PDF.
### Unit Culminating Task: My 4-Year Plan - Explanatory & Reflective Essay

#### Purpose

The purpose of this activity is for students to synthesize their reasonings in their 4-Year Plan (College & Career Plan).

#### Materials and Handouts

<table>
<thead>
<tr>
<th>Planner: Preparing My 4-Year Action Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>4-Year Action Plan Worksheet</td>
</tr>
<tr>
<td>Graduating from High School Powerpoint</td>
</tr>
</tbody>
</table>

#### Student-Facing Instructions

Using your completed “Planner: Preparing My Four-Year Action Plan”, “Worksheet: Four-Year Action Plan”, and your reflective paragraph from “Graduating from High School: Setting Goals”, as well as information from the “Graduating High School Powerpoint”, write a 2-3 page explanatory essay that includes:

- An explanation of your plan (courses you plan to take, tests, and co-curricular activities)
- Why is each of these pieces of your plan important to you?
- How, if you follow your plan, you will be ready for college?
- What have you been doing so far that will help prepare you for success with this plan?
- What challenges do you foresee?
- What might you need to reinforce or change about yourself in order to successfully accomplish your plan?
- What supports will you need?
- What are your immediate next steps going to be?

#### Teacher Notes

Unit Culminating Task Prerequisites: Completion of “Graduating from High School: Setting Goals”, “Preparing My 4-Year Action Plan” and “Worksheet: My 4-Year Action Plan”.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Growth/personal reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions
Write a one-page reflection about your productive summer. Be sure to address the following questions:

- Describe how you spent your summer being productive (job, program, sports, taking care of family, travel, etc.).
- How and why did you decide on this plan?
- What did you need to do to solidify your plan?
- What challenges did you face, and how did you address them?
- How did you grow or learn from your experience?
- Overall, what’s the purpose or importance of doing something meaningful in the summer?
Planner: Preparing My Four-Year Action Plan

Make It Local | Modify the action plan based on graduation requirements for your school or district; then remove this callout and re-save the file before distributing it to students.

Student Name: ___________________________ Date: ______________

Directions: You are going to create a four-year action plan that will help you achieve your goal to graduate from high school. To help you organize your action plan, complete the following prompts.

PART I. Graduation as a DAPPS Goal

I will graduate from high school in ____________.

Graduating from high school is important to me because:

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

This is a positive goal for me because:

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

To pass all of my courses with a C or better, and to accomplish the other steps toward my goal to graduate, I need to take care of myself and stay focused. Specific steps I can take to help keep myself on track are:

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________

_________________________________________________________________________
PART II. My Graduation Requirements

Use Student Resource 9.4, Graduation Requirements, your school’s course listings, and any other information your teacher provides to fill in the following charts on required courses. Be sure to note if any course you plan to take is AP or Honors.

1. I need a minimum of four years of English classes. I plan to take:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

2. I need a minimum of three years of math classes. I plan to take:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

3. I need a minimum of two years of lab science classes. I plan to take:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
4. I need a minimum of three years of social science/history classes. I plan to take:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

5. I need at least two years of the same language other than English. I plan to take:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

6. I need at least one year of the same visual or performing arts class. I plan to take:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
10. In addition to the PSAT, the other college entrance tests I plan to take are:

<table>
<thead>
<tr>
<th>GRADE</th>
<th>FALL SEMESTER</th>
<th>SPRING SEMESTER</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10th</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11th</td>
<td>PSAT</td>
<td></td>
</tr>
<tr>
<td>12th</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Worksheet: Four-Year Action Plan

Make It Local | Modify the action plan based on graduation requirements for your school or district; then remove this callout and re-save the file before distributing it to students.

---

Student Name: ___________________________ Date: __________

Directions: Use the information from your planner to complete your Four-Year Action Plan. Note the assessment criteria on the next page to understand how your work will be assessed.

<table>
<thead>
<tr>
<th>Course/Activity</th>
<th>9th Grade</th>
<th>10th Grade</th>
<th>11th Grade</th>
<th>12th Grade</th>
</tr>
</thead>
<tbody>
<tr>
<td>English (&quot;b&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Math (&quot;c&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Science (&quot;d&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>History/Soc. Sci. (&quot;a&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Language Other Than English (&quot;e&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visual and Performing Arts (&quot;f&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Electives (&quot;g&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College and Career</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Health Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Education</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required Tests</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College Admissions Tests</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Co-Curricular Activities

After you have completed your four-year action plan, check to make sure it meets or exceeds the following assessment criteria:

– The four-year action plan meets all a-g requirements in a logical order.

– The four-year action plan maps when all other graduation requirements will be met, including required courses and tests, according to a realistic timetable.

– The four-year action plan contains co-curricular activities that show a willingness to participate in a range of activities or a strong commitment to specific activities (such as sports or music).

– The four-year action plan includes college admissions tests, scheduled for the appropriate academic years.

– The four-year action plan is comprehensive, neat, legible, and presentable.
Graduating from High School

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Courses and credits for graduation from SFUSD

<table>
<thead>
<tr>
<th>Course</th>
<th>Years</th>
<th>Credits</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>4</td>
<td>40</td>
</tr>
<tr>
<td>Math</td>
<td>3</td>
<td>30</td>
</tr>
<tr>
<td>Lab Science</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Social Science</td>
<td>3</td>
<td>30</td>
</tr>
<tr>
<td>Language</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Physical Education</td>
<td>2</td>
<td>20</td>
</tr>
<tr>
<td>Visual and Performing Arts</td>
<td>1</td>
<td>10</td>
</tr>
<tr>
<td>Health</td>
<td>.5</td>
<td>5</td>
</tr>
<tr>
<td>College and Career</td>
<td>.5</td>
<td>5</td>
</tr>
<tr>
<td>Electives</td>
<td>1 at minimum</td>
<td>50</td>
</tr>
<tr>
<td>Total Credits to Graduate</td>
<td></td>
<td>230</td>
</tr>
</tbody>
</table>

How many credits will you receive for the courses you are taking this semester?

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Types of courses

– Requirements
– Prerequisites
– Honors courses
– AP courses

How many requirements are you taking now? Do you plan to take any honors courses?

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Advanced Placement courses are college level

Colleges and universities look for students who challenge themselves academically. Taking AP courses demonstrates your commitment to doing the most advanced academic work possible.

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Your GPA

Letter grades are worth points:

A (90–100%) = 4.00
B (80–89%) = 3.00
C (70–79%) = 2.00
D (60–69%) = 1.00
F (0–59%) = less than 1.00

What do you predict your GPA for this semester will be?
<table>
<thead>
<tr>
<th>Grade Level</th>
<th>Course Code</th>
<th>Course Title</th>
<th>Credits</th>
<th>GPA</th>
<th>P.E.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman</td>
<td>05</td>
<td>English I</td>
<td>5.0</td>
<td>3.57</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>06</td>
<td>English II</td>
<td>5.0</td>
<td>3.33</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>07</td>
<td>Spanish I</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>08</td>
<td>Spanish II</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>09</td>
<td>Advanced Chorus</td>
<td>1.0</td>
<td>3.64</td>
<td></td>
</tr>
<tr>
<td>Junior</td>
<td>10</td>
<td>Algebra I</td>
<td>5.0</td>
<td>3.57</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>11</td>
<td>Algebra II</td>
<td>5.0</td>
<td>3.33</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>12</td>
<td>Geometry</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>13</td>
<td>World History</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>14</td>
<td>U.S. History</td>
<td>5.0</td>
<td>3.33</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>15</td>
<td>English Language Arts</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>16</td>
<td>World Art I</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>17</td>
<td>World Art II</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td>Senior</td>
<td>18</td>
<td>English IV</td>
<td>5.0</td>
<td>3.57</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>19</td>
<td>Advanced English</td>
<td>1.0</td>
<td>3.64</td>
<td></td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>History of the Arts</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>21</td>
<td>U.S. History</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>22</td>
<td>World Art III</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>23</td>
<td>World Art IV</td>
<td>5.0</td>
<td>3.14</td>
<td>0.5</td>
</tr>
<tr>
<td></td>
<td>24</td>
<td>Advanced Chorus</td>
<td>1.0</td>
<td>3.64</td>
<td></td>
</tr>
</tbody>
</table>

Cumulative GPA: 3.32
P.E. Excluded: 247.5
Calif. High School Exit Exam: 250/250

High school graduation requirements prepare you for UC/CSU admissions

The official University of California seal

The official California State University seal

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<table>
<thead>
<tr>
<th>A-G Subject Area</th>
<th>English (&quot;b&quot; requirement)</th>
<th>Math (&quot;c&quot; requirement)</th>
<th>Science (&quot;d&quot; requirement)</th>
<th>Social Science (&quot;e&quot; requirement)</th>
<th>Language Other Than English (&quot;f&quot; requirement)</th>
<th>Visual and Performing Arts (&quot;g&quot; requirement)</th>
<th>Electives (&quot;h&quot; requirement)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4 Years/40 Credits</td>
<td>3 Years/30 Credits</td>
<td>2 Years/20 Credits (lab science)</td>
<td>3 Years/30 Credits (same language)</td>
<td>1 Year/0 Credits (same subject)</td>
<td>1 Year/0 Credits (advanced course in a-f subject)</td>
<td></td>
</tr>
</tbody>
</table>

Are the classes you are taking a-g?

http://www.ucop.edu/doorways

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Beyond a-g

There are other requirements to get into UC/CSU. To find out about these requirements:

– Talk to your counselor

– Go to the CSU Mentor website at http://www.csumentor.edu/
Other required courses for high school graduation

1. This one! (1 semester/5 credits of Plan Ahead)

2. Physical Education (2 years/20 credits minimum)

3. Health Education (1 semester/5 credits)
Required tests for high school graduation

1. CAHSEE: California High School Exit Exam
2. STAR: Standardized Testing and Reporting Program
Pathways and programs at our school
Graduating from high school is worth it!

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Unit Culminating Task:
10th & 11th Grade College & Career Plan: Reflection and Revision

Purpose
The purpose of this activity is for students to reflect upon and revise their 4-Year Plan (College & Career Plan) to more accurately measure their progress and plan toward their college and career goals.

Materials and Handouts
None

Student-Facing Instructions
Read through the following:
• your previous year’s Explanatory & Reflective Essay
• your transcript
• your College & Career Plan

Part 1: Reflection
• What do you notice about your plan? Have you stuck with it? If you made changes, what were they and why did you make them? What results do you notice from your adherence to or changes to your plans?
• What new modifications do you now want to make to your plan? Why?
• What aspects of your plan do you want to make sure to carry out? How will you ensure your success?
• How, if you follow your revised plan, you will be ready for college?
• What have you been doing so far that will help prepare you for success with this plan?
• What challenges do you foresee?
• What might you need to reinforce or change about yourself in order to successfully accomplish your plan?
• What supports will you need?
• What are your immediate next steps going to be?

Part 2: Revision
Now revise your College & Career Plan in ConnectedEd Studios according to your written reflection.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Resource

Teacher Notes

Unit Culminating Task Prerequisites: Completion of the appropriate grade-level steps of the “ConnectEd Studios College & Career Plan” beforehand.

Assessment

Culminating Assessment: Growth/personal reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Read through the following:
- your previous year’s Explanatory & Reflective Essay
- your transcript
- your College & Career Plan

Part 1: Reflection
- What do you notice about your plan? Have you stuck with it? If you made changes, what were they and why did you make them? What results do you notice from your adherence to or changes to your plans?
- What new modifications do you now want to make to your plan? Why?
- What aspects of your plan do you want to make sure to carry out? How will you ensure your success?
- How, if you follow your revised plan, will you be ready for college?
- What have you been doing so far that will help prepare you for success with this plan?
- What challenges do you foresee?
- What might you need to reinforce or change about yourself in order to successfully accomplish your plan?
- What supports will you need?
- What are your immediate next steps going to be?

Part 2: Revision
Now revise your College & Career Plan in ConnectEd Studios according to your written reflection.
College Admission Plan
Online Research of College Board Website

Purpose
The purpose of this activity is use the College Board website to familiarize students with what colleges are looking for in applicants.

Suggested Grade Level:
10

Materials and Handouts
College Board Website Organizer

Approximate Time Needed:
50 minutes

Student-Facing Instructions
Go to www.collegeboard.com and click on “for students” and go to the student homepage. Take a look at the 5 main sections found on that page. Right now, the “Plan for College” link is most relevant for you. Click on “Starting Points - Your High School Action Plan”; then click on “Action Plan: High School Sophomores”. Look at the calendar headings and descriptions.

Work in pairs to research one of the three topics: extracurricular activities, PSAT tests, or college preparatory courses. Click on the links to read the section for your topic and take notes on the handout, “College Board Website - Student Organizer”.

Form a group with 2 other pairs who did not research your topic. Summarize what you learned for the others and show them where you found the information online while they take notes on their organizer. Then you will take notes while the other 2 pairs explain their information to you.

Assessment
Completion of worksheet: Student Handout L5 College Board Website Organizer.

Adapted from the 10th Grade College Readiness: Intro to College Board Resources workshop
Copyright © 2012 MDRC. All Rights Reserved.
Instructions

Go to www.collegeboard.com and click on “for students” and go to the student homepage. Take a look at the 5 main sections found on that page. Right now, the “Plan for College” link is most relevant for you. Click on “Starting Points - Your High School Action Plan”; then click on “Action Plan: High School Sophomores”. Look at the calendar headings and descriptions.

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Form a group with 2 other pairs who did not research your topic. Summarize what you learned for the others and show them where you found the information online while they take notes on their organizer. Then you will take notes while the other 2 pairs explain their information to you.
TOPIC #1: Extracurricular Activities

1. Why are extracurricular activities important to colleges?

2. What are 3 tips to being involved in extracurricular activities?

3. What else should you know about this area of college preparation?

4. List the extra-curricular activities that you are involved in now.

5. If you are not active now, list 3 possible activities that you might like to explore.
TOPIC #2: PSAT

1. What is the PSAT?

2. Why is it important to take the test?

3. What's on the PSAT?

4. When can you take the test?

5. What's the best way to prepare for this test?

6. What is the Official Student Guide and how can you get it?

7. What else should you know about this area of college preparation?
TOPIC #3: COLLEGE PREPARATORY COURSES

1. Why is it important to take challenging courses to prepare for college?

2. What are some examples of college preparatory courses?

3. How many academic courses should you be taking each semester?

4. How many years do you need of:
   a. English
   b. Math
   c. Science
   d. Social Studies/History
   e. Foreign Languages

5. What else should you know about this area of college preparation?
Checklist Task:
SAT and ACT Overview and Registration

Purpose
The purpose of this activity is to inform students about these tests and how to register.

Suggested Grade Level: 11

Materials and Handouts
SAT and ACT Overview
Testing Info for Students and Families
College Entrance Exams Note-taking Form

Approximate Time Needed: 20 minutes

Student-Facing Instructions
Follow the instructions in the powerpoint to register for your ACT and/or SAT. Submit your emailed registration confirmation once you’re done.

Teacher Notes
This lesson contains information for college admissions testing, including the new SAT, however, check the information and links as they may change over time. It includes a suggested timeline that you may need to tailor to your students. In addition, it may be helpful to watch the registration videos in advance so that you can more easily troubleshoot if students run into registration problems.

Assessment
Completion of note-taking form and test registration, as verified by email confirmation.
Follow the instructions in the powerpoint to register for your ACT and/or SAT. Submit your emailed registration confirmation once you’re done.
### 2015-2016 Testing Info for Students and Families

<table>
<thead>
<tr>
<th>Test</th>
<th>Grade Level</th>
<th>Where and when is it administered?</th>
<th>Registration</th>
<th>Information</th>
<th>Fee*</th>
</tr>
</thead>
<tbody>
<tr>
<td>PSAT</td>
<td>Optional 10th &amp; 11th</td>
<td>At school In October</td>
<td>Students register at school in early September</td>
<td>Offered in October to any 10th &amp; 11th grade student. A good gauge of how students will do on the SAT. These scores are not sent to colleges. Top 1 – 3% nationally (11th grade only) can bring significant college scholarship support through the National Merit Scholarship Program.</td>
<td>$15 Fee waivers for financially eligible 11th graders (10th graders must pay.)</td>
</tr>
</tbody>
</table>
| AP   | 11th & 12th | At school  
The exams are given on specific dates in May: [http://apcentral.collegeboard.com/apc/public/exam/calendar/index.html](http://apcentral.collegeboard.com/apc/public/exam/calendar/index.html) | Students register at school | These tests aren’t required for college admissions, but if a student passes a test, they may receive college credit. | $91 per exam. $29 fee reduction for each exam taken by financially eligible students, depending on the student's state. |
| ACT  | 11th & 12th | Off site: [http://www.actstudent.org/regist/centers/](http://www.actstudent.org/regist/centers/)  
Recommendeed testing window: at least | Student must choose test date and register at [http://www.actstudent.org/regist/](http://www.actstudent.org/regist/) | Either the ACT or SAT is required for all 4-year colleges. The ACT consists of 4 content areas: English, math, reading and science, plus an optional writing section. (Most colleges require the writing section.) This test takes about 3 hours to complete, with an additional 30 minutes for the optional writing portion. Whichever test | ACT: $39.50  
ACT plus Writing: $56.50  
2 fee waivers total are available (not 2 per year) for |
<table>
<thead>
<tr>
<th>Test Type</th>
<th>Grade</th>
<th>Test Date</th>
<th>Recommended Testing Window</th>
<th>Required for Colleges</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAT</td>
<td>11th &amp; 12th</td>
<td>Off site: <a href="http://sat.collegeboard.org/register/test-center-code-search">http://sat.collegeboard.org/register/test-center-code-search</a></td>
<td>at least twice between February of 11th grade through November of 12th grade.</td>
<td>Required by many private schools and recommended for certain majors at UC campuses. These are one hour tests measuring content and skills in specific subject areas. Students can take up to 3 tests on any test date, but we recommend only 1-2 on any one test date.</td>
</tr>
<tr>
<td>SAT Subject Test</td>
<td>11th &amp; 12th</td>
<td>Off site: <a href="http://sat.collegeboard.org/register/test-center-code-search">http://sat.collegeboard.org/register/test-center-code-search</a></td>
<td>Tests should be taken in May or June, close to completing the course.</td>
<td>Required by many private schools and recommended for certain majors at UC campuses. These are one hour tests measuring content and skills in specific subject areas. Students can take up to 3 tests on any test date, but we recommend only 1-2 on any one test date.</td>
</tr>
</tbody>
</table>
financially eligible students. Each waiver is for a test date, not one per exam, so a student can take up to 3 exams on one day using one waiver.

*Additional fees apply for late registration. Fee waivers do not cover late fees. For the ACT, SAT, and SAT subject tests, students who are using fee waivers can send score reports to colleges for free only at the time of registration; if sending scores after the exam is taken, there is no free option for sending scores.

ELM/EPT
All CSUs and California community colleges require that students take the Entry-Level Mathematics test (ELM) and the English Placement Test (EPT) to determine which math and English courses they need when they begin college. If students do not demonstrate proficiency on these tests, they will be required to take non-credit remedial English and math courses in college. (These required courses cost money, however, they are non-credit classes, which means they do not count toward college graduation.) However, students can be exempt from the ELM and EPT by taking and passing the optional Early Assessment Program (EAP) section of the California Standards Test in 11th grade. This test is free, no registration is required, and it is taken at school. Other ways to be exempt are:

<table>
<thead>
<tr>
<th>To be exempt from the Entry Level Mathematics test (ELM)</th>
<th>To be exempt from the English Placement Test (EPT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>● A score of 550 or above on the mathematics section of the College Board SAT Reasoning Test</td>
<td>● A score of 500 or above on the critical reading section of the College Board SAT Reasoning Test</td>
</tr>
<tr>
<td>● A score of 550 or above on a College Board SAT Subject Test in Mathematics (level 1 or level 2)</td>
<td>● A score of 22 or above on the American College Testing (ACT) English Test</td>
</tr>
<tr>
<td>● A score of 23 or above on the American College Testing (ACT) Mathematics Test</td>
<td>● A score of 3 or above on either the Language and Composition or Composition and Literature examination of the College Board Scholastic Advanced Placement Program</td>
</tr>
<tr>
<td>● A score of 3 or above on the College Board Advanced Placement Calculus AB or Calculus BC exam</td>
<td></td>
</tr>
</tbody>
</table>
• A score of 3 or above on the College Board Advanced Placement Statistics examination

If a student does not pass the EAP section of the CA Standards Test or meet the above exemptions, the student will be required to take the ELM and/or EPT at a California State University. Cost: $18 per test. Registration: https://ept-elm.ets.org/CSU/
# College Entrance Exams: Note-taking Form

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are the different tests?</td>
<td></td>
</tr>
<tr>
<td>Which ones should I take?</td>
<td></td>
</tr>
<tr>
<td>When should I take them?</td>
<td></td>
</tr>
<tr>
<td>What dates are they given?</td>
<td></td>
</tr>
<tr>
<td>What are the test registration dates?</td>
<td></td>
</tr>
<tr>
<td>How and where do I register?</td>
<td></td>
</tr>
<tr>
<td>How much do the tests cost?</td>
<td></td>
</tr>
<tr>
<td>Are there waivers available?</td>
<td></td>
</tr>
<tr>
<td>How should I prepare and practice for the different tests?</td>
<td></td>
</tr>
<tr>
<td>Are there different test practicing sites on line?</td>
<td></td>
</tr>
<tr>
<td>Are there test prep programs—at school or off-campus?</td>
<td></td>
</tr>
</tbody>
</table>
## Testing Overview

<table>
<thead>
<tr>
<th>ACT</th>
<th>Either the ACT or SAT is required for all 4-year colleges. The ACT consists of 4 content areas: English, math, reading and science, plus an optional writing section. (Most colleges require the writing section.) This test takes about 3 hours to complete, with an additional 30 minutes for the optional writing portion. Whichever test they choose, the ACT or SAT, we recommend that students take it at least twice.</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAT</td>
<td>Either the SAT or ACT is required for all 4-year colleges. The SAT consists of 3 sections: math, evidence-based reading and writing. The test takes about 3 hours to complete with an additional 50 minutes for the optional essay. Whichever test they choose, the ACT or SAT, we recommend that students take it at least twice.</td>
</tr>
<tr>
<td>SAT Subject Tests</td>
<td>Required by many private schools and recommended for certain majors at UC campuses. These are one hour tests measuring content and skills in specific subject areas. Students can take up to 3 tests on any test date, but we recommend only 1-2 on any one test date.</td>
</tr>
<tr>
<td>AP</td>
<td>These tests aren’t required for college admissions. These scores may assist in college admissions, but more importantly, if a student passes a test, they may receive college credit.</td>
</tr>
</tbody>
</table>
Which test should I take?

The answer is different for each student and you should research the two tests to find out what would be best for you.

Of course, you can always take both tests this spring, and then take the one you did better on a second time.
Some other things to consider:

- What subjects are covered in the tests?
  - ACT has 4 sections: writing, science, math, and English.
  - SAT has 3 sections: writing, reading, and math.

- How are the tests scored?
  - For both the ACT and the new SAT, only correct responses count, you’re not penalized for wrong answers.
When should I take the SAT or ACT?

The minimum suggestion:

1. Winter/Spring of Junior Year
2. Again in June of Junior Year or Early Fall of Senior Year
Registering for the SAT or ACT
## Test Costs

<table>
<thead>
<tr>
<th>Test Type</th>
<th>Details</th>
</tr>
</thead>
</table>
| **ACT** | ACT: $39.50  
ACT plus Writing: $56.50  
2 fee waivers total are available (not 2 per year) for financially eligible students. |
| **SAT** | SAT: $43.00  
SAT with Essay: $54.50  
2 fee waivers total are available (not 2 per year) for financially eligible students. |
| **SAT Subject Tests** | Basic registration: $26.00  
Language test w/listening: add $26  
All other tests: add $18  
2 fee waivers total are available (not 2 per year) for financially eligible students.  
Each waiver is for a test date, not one per exam, so a student can take up to 3 exams on one day using one waiver. |
Fee Waivers

- Students can get up to two SAT fee waivers and two ACT fee waivers total. This does not renew senior year, so if you want to take one of the tests 3 times, you have to pay for the 3rd time.

- Students also get 2 SAT Subject Test fee waivers. You can take up to 3 tests on one test day and the waiver is good for the entire test day. So theoretically, you can get the waiver for 6 tests. However, we recommend only taking a maximum of 2 SAT Subject Tests on one day. If you only take one test on each day, your waivers will be used up on only 2 tests.
Sending Scores

- The only way to have scores sent for free is to list the colleges you want the scores sent to at the time of registration. Otherwise, you will have to pay the fee to have them sent when you apply to colleges next fall.

- SAT:
  - The code to have the SAT scores available to all CSU campuses is: 3594.
  - For UCs, students can send the score to any one campus and all UCs will have access.

- ACT:
  - Have the scores sent to one UC campus and all will have access.
  - Have the scores sent to one CSU campus and all will have access.
Before You Register:

- Know your test date & location
- Have a photo ready to upload
- Know college codes you want scores sent to
- Use high school CEEB code:
- Have your credit card or fee waiver ready
Register Now!

ACT: http://www.actstudent.org/regist/

SAT: http://sat.collegeboard.org/register/sat-us-dates
Are you ready to take the test?

You are if you have the following:

● Your picture ID
● Your printed registration ticket
● Sharpened pencils
● A calculator
● Know your test location and how to get there!
Theme: Community Service & Extracurricular Activities
Document
Community
Service Hours &
Extracurricular
Involvement
Summer Programs

Purpose
This lesson is meant to introduce the value of summer productivity (jobs, volunteer work, sports, programs) and give students time to research and make a plan for their upcoming summer.

Suggested Grade Level:
9, 10, or 11

Materials and Handouts
Summer Plan Worksheet
Washington Post: Summer College Programs Help High Schoolers Test Waters

Approximate Time Needed:
Varies

Student-Facing Instructions
Part 1: Share with your classmates:
1. How have you spent your summers since middle school?
2. When did you start planning your summer activities?
3. How did you learn about the activities/jobs/etc. you participated in?
4. Do already have plans for this coming summer?

Part 2: Read the article: Summer college programs help high schoolers test waters
The article is about summer programs on college campuses. This is not the only type of activity you should consider for the summer, but these can be very helpful if you want to be competitive in your college applications. As you read, write down at least 3 questions or comments you have.

Part 3: Then browse through the websites of 2 of these 4 programs:
1. UC Davis Young Scholars Program: http://ysp.ucdavis.edu/
2. Women’s Technology Program: http://wtp.mit.edu/
3. Leadership Institute for a Diverse America: http://www.ledascholars.org/

Part 4: Participate in a short class discussion about what you noticed in the article and summer program websites.

Part 5: Research summer options and complete the Summer Plan Worksheet.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Resource

**Teacher Notes**
The summer program examples in Part 3 are just examples. You should tailor summer program examples to your specific students. Also check that links and programs are up-to-date. Be sure to share any summer resource lists your school has compiled.

**Assessment**
Completion of Summer Plan Worksheet.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Part 1: Share with your classmates:
1. How have you spent your summers since middle school?
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Part 5: Research summer options and complete the Summer Plan Worksheet.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
### Summer Plan Worksheet

Complete the chart for each summer program or job that you are interested in researching.

<table>
<thead>
<tr>
<th>Name of program/job:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Description of program/job:</td>
<td></td>
</tr>
<tr>
<td>Application requirements (application form, essay, letter of recommendation, etc.):</td>
<td></td>
</tr>
<tr>
<td>Due date:</td>
<td></td>
</tr>
<tr>
<td>Why are you excited about this program/job?</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Name of program/job:</th>
<th></th>
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<tr>
<td>Why are you excited about this program/job?</td>
<td></td>
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</tbody>
</table>
Summer college programs help high schoolers test waters
## Unit Culminating Task:  
**My Productive Summer Reflection**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Suggested Grade Level:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The purpose of this lesson is for students to synthesize and reflect upon their meaningful summer experiences.</td>
<td>10, 11, 12</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Materials and Handouts</th>
<th>Approximate Time Needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>Varies</td>
</tr>
</tbody>
</table>

### Student-Facing Instructions

Write a one-page reflection about your productive summer. Be sure to address the following questions:
- Describe how you spent your summer being productive (job, program, sports, taking care of family, travel, etc.).
- How and why did you decide on this plan?
- What did you need to do to solidify your plan?
- What challenges did you face, and how did you address them?
- How did you grow or learn from your experience?
- Overall, what’s the purpose or importance of doing something meaningful in the summer?

### Teacher Notes

Unit Culminating Task Prerequisites: Completion of “Summer Programs” in the previous school year.

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Growth/personal reflection assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Identify challenges/setbacks and reflect on how to grow as a result
- Honestly acknowledges success and areas of growth
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions
Instructions

Write a one-page reflection about your productive summer. Be sure to address the following questions:

- Describe how you spent your summer being productive (job, program, sports, taking care of family, travel, etc.).
- How and why did you decide on this plan?
- What did you need to do to solidify your plan?
- What challenges did you face, and how did you address them?
- How did you grow or learn from your experience?
- Overall, what’s the purpose or importance of doing something meaningful in the summer?
Theme: Financial Aid Literacy
Understanding
Financial Aid
Options Available
Teaching Resource

Paying for College Part 1:
My Dream College’s Cost of Attendance

Purpose
The purpose of this lesson is for students to understand the concept of cost of attendance, what it includes, and how it differs by school.

Suggested Grade Level:
11

Materials and Handouts
My Dream College Cost of Attendance

Approximate Time Needed:
20 minutes

Student-Facing Instructions

PART 1:
Write in the name of your dream school. Then spend 3-4 minutes completing the “Components of College Cost” and “Estimated Amount” columns.

PART 2:
(Breakout 3 Exercise): Using a computer with Internet access, spend 15 minutes researching information to complete the “Actual Amount” column for your dream school.

Teacher Notes
This lesson is 1st in a 3-lesson series called Paying for College.

BREAKOUT 1: COLLEGE COSTS (10 minutes)

MENTOR:
Do a small group introduction, if appropriate.

COLLEGE COSTS: Spend two minutes discussing cost of attendance (COA) and why it is important. Students were asked to define this as their pre-work for this module.

TRAINER: Issue a one minute time check before calling the class together. Before students begin the college application process, it is important to research each college’s cost of attendance, or COA. Have 1-2 students

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Teacher Resource

share what COA is and why it is important to know. Encourage students not to get hung up on this number—this is the “sticker price” of a college and the majority of students attending that school secure financial aid to be able to afford it. However, it is important to know this amount so students are aware of and can prepare for the financial cost of attaining a college degree.

Refer students to the “My Dream College’s Cost of Attendance” handout. Students have 5 minutes to complete the “Components of College Cost” and “Estimated Amount” columns for their dream school. The “Actual Amount” column will be completed during Breakout 3 – students can leave this section blank for now.

MENTOR:

Help students identify the “Components of College Cost” as a small group. If needed, reference back to the COA discussion and identify some key expense areas.

Encourage students to take their best guess to complete the “Estimated Amount” section.

Spend the remaining time (approximately 1-2 minutes) debriefing. If time permits, you can expand the conversation by asking:

• How did you go about estimating the cost of books, health insurance, etc.?
• Which of these costs is fixed (a necessary expense that is a fixed amount)? Flexible (a necessary expense that can fluctuate in cost; you have some control over how much you want to spend)?

BREAKOUT 3: RESEARCHING COST OF ATTENDANCE (20 minutes)

Materials Needed: Computers with Internet access

TRAINER: Provide directions for Breakout 3. Redirect students to the “My Dream College’s Cost of Attendance” handout. Students will spend the next 15 minutes researching their dream college’s cost of attendance. This will entail going to a college’s website, locating the 2014-15 COA information, and completing the “Actual Amount” column of the handout. Remind students to log the school’s website on their handout.

MODIFICATIONS:

If time permits and adequate technology is available, consider doing a demo in front of the class so students can observe your process. This will require you to have a computer and projector set up. Once the demo is complete, students begin their individual research using the computers.

If you are short on time or computers, conduct the breakout as a class. (See below for additional instruction)

Use UCLA as a sample school. Go to their website: www.ucla.edu. Look for the “Prospective Students” section; click on this link. This will lead you to an undergraduate admissions section where you will find information about tuition, fees, and student budgets.

If students are not able to conduct their own research, they would log this information into their “My Dream College’s Cost of Attendance” handout.

TRAINER TIP: Make sure that the school being researched is the same school that students initially estimated their COA for. Otherwise, they won’t achieve the full value of this exercise. This requires advance preparation.

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Feel free to use an alternate school students are more familiar with.

TRAINER: If students complete the COA research within allocated 15 minutes and have additional time, they can locate their dream school’s financial aid website and find the school’s financial aid offerings. Students should log this financial aid website on their handout for future reference.

For UCLA, go on their website: www.ucla.edu and select “Prospective Students.” Scroll down to “Financial Aid Spotlight” and click on the “More Financial Aid” link. This will take them to the financial aid office website: www.fao.ucla.edu

MENTOR:

Assist students with researching and recording their school’s COA. Again, students should be researching the COA for the initial school they listed in “Breakout 1.” Be prepared to assist them in finding their school’s COA and financial aid information and/or webpage.

After students have completed the worksheet, spend 2-3 minutes debriefing. Some sample questions:

How did your college’s actual COA compare to your estimation? Which costs were over? Under?
How might financial aid be able to offset the cost of college?
What scholarships does the college offer (outside of federal or state aid programs) to help students pay for college?
### MY DREAM COLLEGE’S COST OF ATTENDANCE
(Answer Key with UCLA as a Sample School)

**Part 1:** Write in the name of your dream school. Then spend 3-4 minutes completing the “Components of College Cost” and “Estimated Amount” columns.

**Part 2 (Breakout 3 Exercise):** Using a computer with Internet access, spend 15 minutes researching information to complete the “Actual Amount” column for your dream school.

*Hint: Use Google to find your school’s website and click on the “prospective students” section to find information*

<table>
<thead>
<tr>
<th>Components of College Cost:</th>
<th>Estimated Amount $: (per academic year)</th>
<th>Actual Amount $: (per academic year)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tuition</strong></td>
<td>$</td>
<td>$12,862 (in-state tuition)</td>
</tr>
<tr>
<td><strong>Room &amp; Board</strong></td>
<td>$</td>
<td>$14,571 (assumes living on-campus)</td>
</tr>
<tr>
<td><strong>Books &amp; Supplies</strong></td>
<td>$</td>
<td>$1,599</td>
</tr>
<tr>
<td><strong>Transportation/Travel</strong></td>
<td>$</td>
<td>$585</td>
</tr>
<tr>
<td><strong>Health Insurance</strong></td>
<td>$</td>
<td>$1,938</td>
</tr>
<tr>
<td><strong>Personal Expenses</strong></td>
<td>$</td>
<td>$1,638</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td></td>
<td>$33,193</td>
</tr>
</tbody>
</table>

Dream School: ____________ **UCLA** _______________________________  
School’s Website: __________ www.ucla.edu __________________________  
School’s Financial Aid Website: __________ www.fao.ucla.edu __________

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www.glowfoundation.org
Instructions

PART 1:
Write in the name of your dream school. Then spend 3-4 minutes completing the “Components of College Cost” and “Estimated Amount” columns.

PART 2:
(Breakout 3 Exercise): Using a computer with Internet access, spend 15 minutes researching information to complete the “Actual Amount” column for your dream school.

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**MY DREAM COLLEGE’S COST OF ATTENDANCE**

**PART 1:** Write in the name of your dream school. Then spend 3-4 minutes completing the “Components of College Cost” and “Estimated Amount” columns.

**Part 2 (Breakout 3 Exercise):** Using a computer with Internet access, spend 15 minutes researching information to complete the “Actual Amount” column for your dream school.

*Hint: Use Google to find your school’s website and click on the “prospective students” section to find information*

<table>
<thead>
<tr>
<th>Dream School:</th>
<th>School’s Website:</th>
<th>School’s Financial Aid Website:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Components of College Cost:</th>
<th>Estimated Amount $: (per academic year)</th>
<th>Actual Amount $: (per academic year)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
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</tr>
<tr>
<td></td>
<td>$</td>
<td>$</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>
Paying for College Part 2: What is Financial Aid?

Purpose

The purpose of this lesson is for students to learn about the four basic types of financial aid – scholarships, grants, work study, and loans.

Suggested Grade Level:

11

Materials and Handouts

What Is Financial Aid

Approximate Time Needed:

15 minutes

Student-Facing Instructions

Work with your small group to come up with a definition for “financial aid.” Then use http://studentaid.ed.gov to come up with a 1-2 sentence definition for each of the aid programs listed below. Log your answers in the “Description” column and be ready to share these with your group.

Teacher Notes

This lesson is 2nd in a 3-lesson series called Paying for College.

BREAKOUT 2: FINANCIAL AID OVERVIEW (15 minutes)

Materials Needed: Computers with Internet access (NOTE: If securing a computer for each student is not possible, the breakout can be completed with one computer per student group OR one computer and projector for the entire class – requires the Trainer to run the discussion.)

TRAINER: Refer students to the “What is Financial Aid?” handout. Students have two minutes to define “financial aid” in their small groups. Ask 1-2 students to share their definitions and why they think financial aid is important when choosing a college. Students then have 10 minutes to complete the “Description” section of the table. Students will use http://studentaid.ed.gov to conduct their research.

MODIFICATIONS:

One computer per small group: Students work in their small groups to conduct their financial aid research. One computer for the class: If you are short on time or computers, conduct the breakout as a class.

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### WHAT IS FINANCIAL AID?

**Answer Key**

**Directions:** Work with your small group to come up with a definition for “financial aid.” Then use [http://studentaid.ed.gov](http://studentaid.ed.gov) to come up with a 1-2 sentence definition for each of the aid programs listed below. Log your answers in the “Description” column and be ready to share these with your group.

**Financial Aid is any type of funding that helps cover your total cost of attendance. It is often divided into three categories: money you receive, money you earn, and money you borrow.**

<table>
<thead>
<tr>
<th>Type of Aid</th>
<th>Source of Aid/How to Apply</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarships</td>
<td>Scholarships can come from the federal government, your state government, your college, or a private or nonprofit organization. Each scholarship has its own application process—be sure to do your research to meet the deadlines!</td>
<td>Scholarships are free money—financial aid that doesn’t have to be repaid. Scholarships are usually awarded based on merit.</td>
</tr>
<tr>
<td>Grants</td>
<td>Grants, like scholarships, can come from the federal government, your state government, your college, or a private or nonprofit organization. Students must complete FAFSA to be eligible for grants.</td>
<td>Grants are free money—financial aid that doesn’t have to be repaid. Grants are usually awarded based on financial need.</td>
</tr>
<tr>
<td>Work Study</td>
<td>Federal work study is administered by schools and paychecks are subsidized by the government.</td>
<td>The federal work study program provides part-time jobs for students with financial need allowing them to earn money to help pay education expenses. Jobs are located both on and off-campus; and emphasizes employment in civic education and work related to the student’s course of study.</td>
</tr>
<tr>
<td>Federal loans</td>
<td>Federal loans are funded by the federal government and students must complete FAFSA to qualify.</td>
<td>Federal loans are borrowed money that needs to be repaid and include many benefits not typically offered with private loans: lower, fixed interest rates; flexible repayment plans; option for forbearance and deferment; and, students will not have to start repaying federal loans until you graduate, leave school, or change enrollment status to less than half time.</td>
</tr>
<tr>
<td>Private loans</td>
<td>These loans are made by a lender such as a bank, credit union, state agency, or school; and requires a separate application process.</td>
<td>In contrast, private loans are generally more expensive than federal student loans.</td>
</tr>
</tbody>
</table>
Instructions

Work with your small group to come up with a definition for “financial aid.” Then use http://studentaid.ed.gov to come up with a 1-2 sentence definition for each of the aid programs listed below. Log your answers in the “Description” column and be ready to share these with your group.
**WHAT IS FINANCIAL AID?**

**Directions:** Work with your small group to come up with a definition for “financial aid.” Then use [http://studentaid.ed.gov](http://studentaid.ed.gov) to come up with a 1-2 sentence definition for each of the aid programs listed below. Log your answers in the “Description” column and be ready to share these with your group.

**Financial Aid is:**  

<table>
<thead>
<tr>
<th>Type of Aid:</th>
<th>Source of Aid/How to Apply:</th>
<th>Description:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarships</td>
<td>Scholarships can come from the federal government, your state government, your college, or a private or nonprofit organization. Each scholarship has its own application process—be sure to do your research to meet the deadlines!</td>
<td></td>
</tr>
<tr>
<td>Grants</td>
<td>Grants, like scholarships, can come from the federal government, your state government, your college, or a private or nonprofit organization. Students must complete FAFSA to be eligible for grants.</td>
<td></td>
</tr>
<tr>
<td>Work Study</td>
<td>Federal work study is administered by schools and paychecks are subsidized by the government.</td>
<td></td>
</tr>
<tr>
<td>Federal loans</td>
<td>Federal loans are funded by the federal government and students must complete FAFSA to qualify.</td>
<td></td>
</tr>
<tr>
<td>Private loans</td>
<td>These loans are made by a lender such as a bank, credit union, state agency, or school; and requires a separate application process.</td>
<td></td>
</tr>
</tbody>
</table>
### Purpose

In this lesson, students reflect upon the concept of cost of attendance, the four basic types of financial aid and the cost of attendance and financial aid available at his/her “dream college.”

### Suggested Grade Level:

11

### Materials and Handouts

Student Reflection

### Approximate Time Needed:

20 minutes

### Student-Facing Instructions

Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a one-page reflection in which you address the following questions:
  - What information resonated with you about today’s workshop?
  - What information was new to you?
  - What information was most helpful to learn about? Why?
  - What knowledge can you pass on or share with family members?
  - What next steps can you take based on what you learned?

### Teacher Notes

This lesson is 3rd in a 3-lesson series called Paying for College.

### Formative Assessment

Experience/understanding reflection aligned to quality criteria:

Student Learning Outcomes assessed in this task:

- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:

- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

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Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a one-page reflection in which you address the following questions:
- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- What knowledge can you pass on or share with family members?
- What next steps can you take based on what you learned?
STUDENT REFLECTION

In today’s workshop, I learned about:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

The most helpful piece of information I learned was:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

After today’s workshop, I plan to:

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

<table>
<thead>
<tr>
<th>HOMEWORK</th>
<th>PRE-WORK FOR WORKSHOP ON:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Students will discuss their dream college’s cost of attendance and financial aid offerings with their parents.</td>
<td>_________________________</td>
</tr>
</tbody>
</table>
Purpose
This lesson teaches students general financial vocabulary and gives students examples of different ways to fund college.

Suggested Grade Level:
11

Materials and Handouts
Case Studies Funding Ed

Approximate Time Needed:
50 minutes

Student-Facing Instructions

Part 1:
Read one case study with your group. Discuss and define the following terms with your group: Grant, Fee Waiver, Loan, Interest. Check your definitions online or using a dictionary and write out a definition for each of these terms in your own words.

Part 2:
Read each of the remaining case studies and with your group, discuss and write responses to each question.

Part 3:
Write a one paragraph reflection about funding your education. What did you learn from these case studies? What can you start doing now to help fund your college education?

Formative Assessment
Experience/Understanding reflective paragraph aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

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Part 1:
Read one case study with your group. Discuss and define the following terms with your group: Grant, Fee Waiver, Loan, Interest. Check your definitions online or using a dictionary and write out a definition for each of these terms in your own words.

Part 2:
Read each of the remaining case studies and with your group, discuss and write responses to each question.

Part 3:
Write a one paragraph reflection about funding your education. What did you learn from these case studies? What can you start doing now to help fund your college education?
Case Studies: Funding Their Educations

Lorenzo Brankovic

Lorenzo is a full-time student at City College. He is studying automotive and motorcycle technology, and someday he wants to own his own shop, customizing and repairing bikes. His uncle owns a car repair shop and Lorenzo has always enjoyed hanging out there and learning how engines work.

Lorenzo shares an apartment with a friend from high school. He doesn’t really get along with his parents very well, so he needs to pay for his education and living expenses himself.

For the 2011–2012 school year, it cost Lorenzo $17,442 to attend City College and pay for his share of the apartment expenses. Lorenzo was qualified to receive a fee waiver from the Community College Board of Governors, as well as several federal and state grants. He qualified for these grants because he doesn’t make very much money and because he maintained at least a 2.5 GPA. Lorenzo received $8,965 in grants, which left him with $8,477 to pay.

Lorenzo worked part-time during the school year and earned $3,500. Lorenzo’s aunt and uncle offered to lend him an additional $3,500 and not to charge him any interest. Lorenzo will pay them back by working in his uncle’s shop once he graduates. He worked during the summer to make up the remaining amount for the year.

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount of Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants (Federal and State) and Fee Waivers</td>
<td>$8,965</td>
</tr>
<tr>
<td>Part-Time Job</td>
<td>$3,500</td>
</tr>
<tr>
<td>Summer Job</td>
<td></td>
</tr>
<tr>
<td>Loan from Aunt and Uncle</td>
<td>$3,500</td>
</tr>
<tr>
<td>Total</td>
<td>$17,442</td>
</tr>
</tbody>
</table>

Questions:

1. How much did Lorenzo need to earn in his summer job to make up the remaining amount? Write the amount in the chart.

2. If Lorenzo only needs to borrow $1,500 from his aunt and uncle for his second year at City College, and they don’t charge any interest because he’s their nephew, how much will he owe them when he graduates?
Kanya Metharom

Kanya’s family immigrated to the United States 20 years ago—about six months before Kanya was born. She is the only person in her family to have earned a high school diploma, and she graduated with honors. Now, Kanya goes to the State University full time. She wants to become a TV news reporter.

Kanya’s family has very little money. Her dad was injured in an accident and can’t work anymore, and her mom works for a cleaning service, cleaning people’s houses. Paying for college is difficult, and Kanya lives at home to save money.

For the 2011–2012 school year, it cost Kanya $16,469 to attend college and live off campus. Kanya is qualified to receive grants from the federal government, the state government, and the state university system. She qualified for these grants because she had a 3.1 GPA and because her family’s income was so low. Kanya received $10,572 in grants. That left her with $5,897 to pay.

Kanya researched scholarships and applied for several of them. She won one scholarship for first-generation college students, worth $1,000. She also got a part-time job on campus and earned $2,346 over the course of the academic year. During the summer, she worked a different job and earned an additional $800. The rest of the money came from a student loan.

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount of Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants (Federal, State, and University)</td>
<td>$10,572</td>
</tr>
<tr>
<td>On-Campus Job</td>
<td>$2,346</td>
</tr>
<tr>
<td>Summer Job</td>
<td>$800</td>
</tr>
<tr>
<td>Scholarship</td>
<td>$1,000</td>
</tr>
<tr>
<td>Student Loan</td>
<td></td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$16,469</strong></td>
</tr>
</tbody>
</table>

Questions:

1. How much does Kanya need to borrow in student loans to make up the difference? Write the amount in the chart.

2. If Kanya’s financial aid remains the same and she borrows this same amount every year, how much will she owe when she graduates in four years (not counting interest)?
Tai Wei Guo

Tai Wei has always been an excellent student, and he loves animals. So no one was really surprised when he decided to become a veterinarian. Tai Wei is a full-time student at a four-year university and lives in one of the dorms on campus.

Tai Wei’s dad and step-mom work very hard; together, they make about $60,000 a year. It’s really important to them that Tai Wei get a good education, and they know that he will have to go to graduate school if he wants to become a vet. They want to help out with some of his educational expenses, but they’ve got his little sister to take care of, too, so they can’t pay for his entire education.

For the 2011–2012 school year, it cost Tai Wei $31,200 to attend college full-time and live in the dorms. Since Tai Wei was a good student and his family’s resources are somewhat limited, Tai Wei qualified for federal grants, state grants, and university grants totaling $16,700. That left Tai Wei with $14,500 to pay.

Because of his good grades, Tai Wei receives an annual scholarship of $2,500, which he can keep for all four years as long as he maintains a 3.25 GPA. Tai Wei’s parents really wanted to help him, so they offered to pay $5,000 of the expenses. They used some of the money in their savings account, and they also took out a parent loan. Tai Wei got a work-study job on campus, which earned him another $2,400 toward his educational expenses. In the summer, he did a paid internship at a local vet hospital, which earned him an additional $1,700. The rest of the money came from a student loan.

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount of Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants (Federal, State, and University)</td>
<td>$16,700</td>
</tr>
<tr>
<td>Scholarship</td>
<td>$2,500</td>
</tr>
<tr>
<td>Parent Contribution</td>
<td>$5,000</td>
</tr>
<tr>
<td>On-Campus Job</td>
<td>$2,400</td>
</tr>
<tr>
<td>Summer Job</td>
<td>$1,700</td>
</tr>
<tr>
<td>Student Loan</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$31,200</td>
</tr>
</tbody>
</table>

Questions:

1. How much student loan money does Tai Wei need to borrow to meet his expenses? Write the amount in the chart.

2. If Tai Wei had to borrow that amount for his first three years of college, but receives an extra scholarship to cover that amount his senior year, how much would he owe when he graduates (not counting interest)?
Azucena Suárez

Azucena is hard working and ambitious. Ever since she was a little girl, she has been fascinated by her father’s job—he owns his own coffee importing business—and Azucena always said she wanted to run her own company, too. She got good grades, was on Student Council during her senior year, and played softball.

Azucena decided to attend a private university in her hometown. Their business school offers a degree in Entrepreneurship and Innovation, which is perfect, since Azucena wants to launch her own business as soon as she graduates. She wants to be careful about taking on too many student loans, because she will need to be able to invest money in her business. Her parents can help out some, but they think it’s important that she helps to pay for her own education, too.

For the 2011–2012 school year, it cost Azucena $35,300 to attend the university full-time and live on campus. Since private universities usually try hard to arrange grants, loans, and scholarships for their students, Azucena received $9,910 in grants. That left her with $25,390 to pay.

Private universities recruit students with good grades and strong co-curricular activities to come to their school. The school offered Azucena a $7,500 annual scholarship, as long as she maintains a 3.0 GPA and plays on the softball team. Azucena’s parents agreed to match her scholarship, so they are also contributing $7,500 each year. Azucena worked a part-time job on campus, earning $2,000. In the summer, she worked in her father’s business, earning an additional $1,500. Azucena has applied for additional scholarships to help her meet the rest of her need.

<table>
<thead>
<tr>
<th>Source</th>
<th>Amount of Money</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grants</td>
<td>$9,910</td>
</tr>
<tr>
<td>University Scholarship</td>
<td>$7,500</td>
</tr>
<tr>
<td>Parent Contribution</td>
<td>$7,500</td>
</tr>
<tr>
<td>On-Campus Job</td>
<td>$2,000</td>
</tr>
<tr>
<td>Summer Job</td>
<td>$1,500</td>
</tr>
<tr>
<td>Additional Scholarships</td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$35,300</td>
</tr>
</tbody>
</table>

Questions:

1. How much money in additional scholarships will Azucena have to get in order to meet her expenses?

2. If she receives scholarships for only half the money she needs, how much would she have to borrow in a student loan?
Purpose

In this lesson, students will learn the concept of cost of attendance, what it includes, and how it differs by type of school. Then they will locate the cost of attendance information for schools he/she is interested in.

Suggested Grade Level:

11

Materials and Handouts

Researching College Costs
College Costs

Approximate Time Needed:

20 minutes

Student-Facing Instructions

Visit the college website for the school(s) you are interested in and research their cost of attendance. Remember, the costs listed on the website are AVERAGES of the students attending the school. A good place to start is the prospective student web page or simply typing in “Cost of Attendance” in the search bar located on the school’s home page.

Teacher Notes

This lesson is 1st in a 2-lesson series called College Costs.

Assessment

Completion of worksheet.
Visit the college website for the school(s) you are interested in and research their cost of attendance. Remember, the costs listed on the website are AVERAGES of the students attending the school. A good place to start is the prospective student web page or simply typing in “Cost of Attendance” in the search bar located on the school's home page.
**RESEARCHING COLLEGE COSTS**

**Directions:** Visit the college website for the school(s) you are interested in and research their cost of attendance. Remember, the costs listed on the website are AVERAGES of the students attending the school. A good place to start is the prospective student webpage or simply typing in “Cost of Attendance” in the search bar located on the school’s home page.

<table>
<thead>
<tr>
<th>Name of School</th>
<th>Tuition/ Fees</th>
<th>Books and Supplies</th>
<th>Room and Board</th>
<th>Transportation</th>
<th>Personal</th>
<th>Other</th>
<th>Total Cost of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
<td>$</td>
</tr>
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<td>$</td>
<td>$</td>
<td>$</td>
</tr>
</tbody>
</table>

**Things to Consider for Your First Year in College:**

1. Will you be living on-campus, off-campus, or at home?

   _____________________________________________________________

2. How do you plan to get around? What can you afford? (e.g. driving, public transit, biking, etc.)

   _____________________________________________________________

3. What personal expenses do/will you have?

   _____________________________________________________________

4. Are there other expenses you will need to pay for?

   _____________________________________________________________

5. How will you cover these expenses? What can you do now to prepare for these costs?

   _____________________________________________________________

6. Will you be able to save money in college and if so, where will the money come from?

   _____________________________________________________________
## COLLEGE COSTS

### COST OF ATTENDANCE BY TYPE OF COLLEGE (2014-15) – NORTHERN CALIFORNIA

<table>
<thead>
<tr>
<th>School</th>
<th>Tuition/ Fees</th>
<th>Book and Supplies</th>
<th>Room/ Board*</th>
<th>Health Insurance</th>
<th>Transportation</th>
<th>Personal</th>
<th>Total Cost of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community College: Foothill College**</td>
<td>$1,500</td>
<td>$1,746</td>
<td>$11,646</td>
<td>n/a</td>
<td>$1,278</td>
<td>3,132</td>
<td>$19,302</td>
</tr>
<tr>
<td>SF State University (In-State Resident)</td>
<td>$6,468</td>
<td>$1,826</td>
<td>$13,052</td>
<td>n/a</td>
<td>$1,496</td>
<td>$1,364</td>
<td>$24,206</td>
</tr>
<tr>
<td>SF State University (Out-of-State Resident)***</td>
<td>$15,396</td>
<td>$1,826</td>
<td>$13,052</td>
<td>n/a</td>
<td>$1,496</td>
<td>$1,364</td>
<td>$32,756</td>
</tr>
<tr>
<td>UC Santa Cruz (In-State Resident)</td>
<td>$13,398</td>
<td>$1,440</td>
<td>$14,730</td>
<td>$2,415</td>
<td>$573</td>
<td>$1,800</td>
<td>$34,356</td>
</tr>
<tr>
<td>UC Santa Cruz (Out-of-State Resident)</td>
<td>$36,276</td>
<td>$1,440</td>
<td>$14,730</td>
<td>$2,415</td>
<td>$573</td>
<td>$1,800</td>
<td>$57,234</td>
</tr>
<tr>
<td>Santa Clara University (Private)</td>
<td>$43,812</td>
<td>$1,746</td>
<td>$12,921</td>
<td>n/a</td>
<td>$864</td>
<td>$2,295</td>
<td>$61,638</td>
</tr>
</tbody>
</table>

* Assumes students are living on campus for four-year schools and near campus for community colleges. Students are not living at home and commuting.
** Non-residents are charged an additional $144.00 per unit per quarter.
*** Assumes students are taking 12 units/semester at an additional $372 per unit plus the in-state tuition and fee rates.

### COST OF ATTENDANCE FOR CALIFORNIA RESIDENTS (2014-15) – SOUTHERN CALIFORNIA

<table>
<thead>
<tr>
<th>Type of School</th>
<th>Tuition/ Fees</th>
<th>Book and Supplies</th>
<th>Room/ Board*</th>
<th>Health Insurance</th>
<th>Transportation</th>
<th>Personal/ Misc.</th>
<th>Total Cost of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community College: East Los Angeles College (2013-14)</td>
<td>$1,220</td>
<td>$1,710</td>
<td>$11,268</td>
<td>n/a</td>
<td>$1,323</td>
<td>$2,844</td>
<td>$18,365</td>
</tr>
<tr>
<td>Cal State L.A. (In-State Resident)</td>
<td>$6,343</td>
<td>$1,809</td>
<td>$12,627</td>
<td>n/a</td>
<td>$1,389</td>
<td>$1,365</td>
<td>$23,533</td>
</tr>
<tr>
<td>Cal State L.A. (Out-of-State Resident)</td>
<td>$15,271</td>
<td>$1,809</td>
<td>$12,627</td>
<td>n/a</td>
<td>$1,389</td>
<td>$1,365</td>
<td>$32,461</td>
</tr>
<tr>
<td>UCLA (In-State Resident)</td>
<td>$12,862</td>
<td>$1,599</td>
<td>$14,571</td>
<td>$1,938</td>
<td>$585</td>
<td>$1,638</td>
<td>$33,193</td>
</tr>
<tr>
<td>UCLA (Out-of-State Resident)</td>
<td>$35,740</td>
<td>$1,599</td>
<td>$14,571</td>
<td>$1,938</td>
<td>$585</td>
<td>$1,638</td>
<td>$56,071</td>
</tr>
<tr>
<td>University of Southern California (Private)**</td>
<td>$48,347</td>
<td>$1,500</td>
<td>$13,334</td>
<td>n/a</td>
<td>$580</td>
<td>$1,000</td>
<td>$64,761</td>
</tr>
</tbody>
</table>

*Assumes students are living on campus for four-year schools and near campus for community colleges. Students are not living at home and commuting.
Purpose
In this lesson, students reflect upon the concept of cost of attendance, what it includes, and how it differs by type of school and the schools he/she is interested in.

Suggested Grade Level:
11

Materials and Handouts
Student Reflection

Approximate Time Needed:
25 minutes

Student-Facing Instructions
Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a reflective paragraph in which you address the following questions:
- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- What knowledge can you pass on or share with family members?
- What next steps can you take based on what you learned?

Teacher Notes
This lesson is 2nd in a 2-lesson series called College Costs.

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Formative Assessment

Experience/understanding reflection aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

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**Instructions**

Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a reflective paragraph in which you address the following questions:
- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- What knowledge can you pass on or share with family members?
- What next steps can you take based on what you learned?

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STUDENT REFLECTION

In today’s workshop, I learned about:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

The most helpful piece of information I learned was:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

After today’s workshop, I plan to:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

<table>
<thead>
<tr>
<th>HOMEWORK</th>
<th>PRE-WORK FOR WORKSHOP ON:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talk with your parent(s) about college costs and what you can do to start preparing including applying for financial aid and scholarships and discussing any financial support the family can provide.</td>
<td></td>
</tr>
</tbody>
</table>
Purpose
In this lesson, students will define and outline the advantages and disadvantages of various types of financial aid including scholarships, grants, work study, and loans. Students will then prioritize specific types of aid according to what they would accept first and last.

Suggested Grade Level: 11

Materials and Handouts
Comparing Financial Aid
Financial Aid Reference Materials And Scholarships Defined
Grant Comparison Table
Federal Work Study Defined
Federal Loan Comparison Table

Approximate Time Needed: 15 minutes

Student-Facing Instructions
Come up with a definition for financial aid and each of the main types of aid. List 2-3 advantages and disadvantages for each on the Comparing Financial Aid handout using the other handouts as reference materials.

Teacher Notes
This lesson is 1st in a 2-lesson series called Financial Aid 101. Some information in the handouts is California-specific.

Assessment
Completion of worksheet.

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**COMPARING FINANCIAL AID**  
*(Answer Key)*

**Directions:** Come up with a definition for financial aid and each of the main types of aid. List 1-2 advantages and disadvantages for each.

Financial Aid is: *any type of funding that helps cover your total cost of attendance (i.e. tuition, fees, books, room and board, transportation, and other general living expenses). It is typically divided into three categories: money you receive (e.g. grants and scholarships), money you earn (e.g. work study), and money you borrow (e.g. federal loans). Completing the FAFSA automatically applies for most federal and state aid programs.*

<table>
<thead>
<tr>
<th>Type of Aid</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Scholarships:</strong></td>
<td>1. Free money</td>
<td>1. Can be a complex application process requiring additional supplements (essays, transcript, etc.)</td>
</tr>
<tr>
<td><em>Free money that covers your college expenses.</em></td>
<td>2. Various eligibility criteria – lots of different scholarships available including those for AB540 students</td>
<td></td>
</tr>
<tr>
<td><em>Securing scholarships could reduce the amount you need to borrow or work once you are in college or may help you cover a financial gap once you have received federal or state aid.</em></td>
<td>3. Funding may be renewable</td>
<td></td>
</tr>
<tr>
<td><strong>Grants:</strong></td>
<td>1. Free Money</td>
<td>1. Federal grants are not available for AB540 students</td>
</tr>
<tr>
<td><em>Free money that covers your college expenses.</em></td>
<td>2. Simple application process (generally just FAFSA)</td>
<td></td>
</tr>
<tr>
<td><em>Grants are awarded based on financial need and multiple grants can be awarded to a student.</em></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Work Study:</strong></td>
<td>1. Money does not need to be repaid</td>
<td>1. Less time to focus on academics</td>
</tr>
<tr>
<td><em>Money that is earned from a part-time job on or off campus. There are many benefits to work study including flexible work hours. Work study is offered to students in their financial aid award letter.</em></td>
<td>2. Convenient work location</td>
<td>2. Funding is not available for AB540 students</td>
</tr>
<tr>
<td><strong>Federal Loans:</strong></td>
<td>1. Unlike a job, loans do not require any time commitment other than the application process</td>
<td>1. Money needs to be repaid with interest</td>
</tr>
<tr>
<td><em>Borrowed money that is repaid with interest.</em></td>
<td>2. Generally better interest rate and repayment terms (compared to private loans)</td>
<td>2. Funding is not available for AB540 students</td>
</tr>
<tr>
<td><em>Loans should always be accepted after all other forms of financial aid have been explored. Prioritize federal loans over private loans as they offer fixed interest rates and more flexible repayment schedules.</em></td>
<td>3. Submit FAFSA to apply</td>
<td></td>
</tr>
</tbody>
</table>

When it comes to financial aid, accept scholarships and grants first, work study second, subsidized loans third, unsubsidized loans fourth, and private loans last.
Instructions

Come up with a definition for financial aid and each of the main types of aid. List 2-3 advantages and disadvantages for each on the Comparing Financial Aid handout using the other handouts as reference materials.
COMPARING FINANCIAL AID

Directions: Come up with a definition for financial aid and each of the main types of aid. List 2-3 advantages and disadvantages for each.

Financial Aid is: _____________________________________________________________

<table>
<thead>
<tr>
<th>Type of Aid</th>
<th>Advantages</th>
<th>Disadvantages</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarships:</td>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
<td>3.</td>
</tr>
<tr>
<td>Grants:</td>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
<td>3.</td>
</tr>
<tr>
<td>Work Study:</td>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
<td>3.</td>
</tr>
<tr>
<td>Federal Loans:</td>
<td>1.</td>
<td>1.</td>
</tr>
<tr>
<td></td>
<td>2.</td>
<td>2.</td>
</tr>
<tr>
<td></td>
<td>3.</td>
<td>3.</td>
</tr>
</tbody>
</table>

When it comes to financial aid, accept _______ and _______ first, _______ second, _______ third, _______ fourth, and _______ last.
## FINANCIAL AID REFERENCE MATERIALS
### SCHOLARSHIPS DEFINED

<table>
<thead>
<tr>
<th><strong>What is a Scholarship?</strong></th>
<th>Scholarships are <strong>free money</strong> that covers your college expenses. Securing scholarships could reduce the amount you need to borrow or work once you are in college or may help you cover a financial gap once you have received any federal or state aid. Read the eligibility requirements carefully and apply to as many scholarships as possible to maximize the amount of money you have for college. <strong>Prioritize local scholarships</strong> as they tend to be less competitive, thereby increasing your chances of being awarded with funding. Remember, legitimate scholarship organizations do not ask for an application fee.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>What are the Eligibility Requirements?</strong></td>
<td>Scholarships can be awarded on a number of criteria including financial need, merit (such as having a strong academic record, demonstrated leadership, community service, or athletics), or even your area of study. <strong>AB540 students are eligible to receive scholarships</strong> – read the application carefully to ensure that a social security number is not required.</td>
</tr>
</tbody>
</table>
| **Where Can I Find Scholarships?** | Scholarships can be found in a number of places:  
- The internet  
- Visit your college counselor/advisor as many local scholarship opportunities are shared with schools  
- Research local associations, businesses, and organizations  
- Ask your parents if their employer offers any scholarships  
- Check your university’s financial aid office to inquire about institutional funding |
| **How do I Apply for Scholarships?** | Most scholarships have a general application form and may require additional supplements such as an essay, transcript, or recommendation letter. |
| **What Scholarship Tips Have You Heard?** | 1. **Be organized:** Stay on top of deadlines, gather all pertinent documents, and make copies of everything you submit.  
2. **Be honest:** Don’t exaggerate your grades, memberships, skills, or qualifications. It is better to focus on the scholarships for which you might be eligible.  
3. **Proofread your application:** Review everything. Typos are a sure way not to be considered for a scholarship. Consider asking a parent, teacher, or friend to review your application.  
4. **Be timely:** Many scholarship organizations have a firm policy about their deadline. Submit your application as early as possible to ensure it is received on time. |

**Beware of Scholarship Scams!**

Never pay money to find, apply, or receive a scholarship. Be on the lookout for:  
- Companies that guarantee you will receive a scholarship by paying an application or other fee  
- Websites that charge you for financial aid information that you can access for free  
- Companies that ask for your financial, credit card, or bank account information

For more information on scholarship scams, visit www.ftc.gov/scholarshipscams
# GRANT COMPARISON TABLE

Source: www.studentaid.ed.gov

## FEDERAL AND STATE GRANT PROGRAMS

<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Award Amount</th>
<th>Eligibility</th>
<th>Application Process</th>
</tr>
</thead>
</table>
| Federal Pell Grant | Maximum: $5,730/year | 1. Be a U.S. citizen or conditional alien  
2. Demonstrate financial need  
3. For students pursuing their first bachelor’s degree | Submit FAFSA |
| Federal Supplemental Educational Opportunity Grant (FSEOG) | Maximum: $4,000/year | 1. Be a U.S. citizen or conditional alien  
2. Demonstrate financial need  
3. Pell Grant recipients given priority | Submit FAFSA |
| Federal TEACH Grant | Maximum: $4,000/year | 1. Be a U.S. citizen or conditional alien  
2. Be an undergraduate, graduate, or post-baccalaureate student pursuing a teaching career  
3. Agree to serve at least four years as a full-time teacher in a high need field (school or educational service industry) serving low-income students  
4. Meet academic requirements | Submit FAFSA |
| Cal Grant A | UC: up to $12,192/year  
Private: up to $8,056/year  
CSU: up to $5,742/year | 1. Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria  
2. Be a California resident when you graduated from high school or meet AB540 criteria  
3. Have a SSN or meet AB540 criteria  
4. Demonstrate financial need  
5. Attend a qualifying California college  
6. Be an undergraduate student  
7. Meet the 3.0 high school GPA requirement | Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2nd |
| Cal Grant B | Maximum: $1,473 for year one  
Tuition/fee award in the same amount as Cal Grant A after year one. | 1. Meet criteria 1-6 (from Cal Grant A)  
2. Meet the 2.0 high school GPA requirement | Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2nd |
| Cal Grant C | Maximum: $547 for books, tools, or equipment at an occupational or career technical school  
Maximum: $2,462 for tuition | 1. Meet criteria 1-4 (from Cal Grant A)  
2. For students attending technical or career schools (AA and Certificate programs only) | Submit FAFSA (Dream Application for AB540 students) and Cal Grant C Supplement Form |
<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Award Amount</th>
<th>Eligibility</th>
<th>Application Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>California Chafee Grant</td>
<td>Minimum: $5,000/year for job training or college up to cost of attendance</td>
<td>1. Demonstrate financial need</td>
<td>Submit FAFSA (Dream Application for AB540 students) and Chafee Grant Application</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Student was in foster care between ages 16-18</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Be enrolled in school at least half-time</td>
<td></td>
</tr>
<tr>
<td>Child Development Grant</td>
<td>California Community College: $1,000/year</td>
<td>1. Demonstrate financial need</td>
<td>Submit FAFSA and Child Development Grant Application</td>
</tr>
<tr>
<td></td>
<td>Four-Year College: $2,000/year</td>
<td>2. Be nominated by an eligible postsecondary institution or by the</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>employing agency</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>3. Be pursuing a child development permit and plan to work at a licensed</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>children’s center in California</td>
<td></td>
</tr>
<tr>
<td>Law Enforcement Person Dependants Grant</td>
<td>Awards match the amount of Cal Grants; range from $100 to $12,192 for up to</td>
<td>1. Demonstrate financial need</td>
<td>Submit FAFSA and Law Enforcement Person Dependants Grant Application</td>
</tr>
<tr>
<td></td>
<td>four years</td>
<td>2. Be a spouse or dependent of a California peace officer, firefighter, or</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>specified law enforcement employee who died or became completely disabled</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>in the line of duty</td>
<td></td>
</tr>
<tr>
<td>California National Guard Education</td>
<td>[UC: up to $12,192]</td>
<td>1. Demonstrate financial need</td>
<td>Submit FAFSA and California National Guard Education Assistance Award Program</td>
</tr>
<tr>
<td>Assistance Award Program</td>
<td>[Private: up to $12,192]</td>
<td>2. Be a California resident</td>
<td>application by June 14</td>
</tr>
<tr>
<td></td>
<td>[CSU: up to $5,472]</td>
<td>3. Have two years of qualifying military service with the California</td>
<td></td>
</tr>
<tr>
<td></td>
<td>[CCC: up to $1,648]</td>
<td>National Guard, State Military Reserve, or Naval Militia</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>4. Minimally enroll in three units/term</td>
<td></td>
</tr>
<tr>
<td>University of California (UC) State Aid</td>
<td>Varies</td>
<td>1. Demonstrate financial need</td>
<td>Contact your UC’s financial aid office</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Be a UC undergraduate or graduate student</td>
<td></td>
</tr>
<tr>
<td>California State University (CSU) Grant</td>
<td>Varies – helps covers CSU tuition fees</td>
<td>1. Demonstrate financial need</td>
<td>Contact the financial aid office</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Be a CSU undergraduate or graduate student</td>
<td></td>
</tr>
<tr>
<td>Educational Opportunity Program (EOP) Grant</td>
<td>Maximum: $2,000</td>
<td>1. Demonstrate financial need</td>
<td>Contact the financial aid office</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Be a CSU undergraduate student admitted through EOP</td>
<td></td>
</tr>
<tr>
<td>California Community College (CCC) Board of</td>
<td>Varies – helps cover registration fees</td>
<td>1. Demonstrate financial need</td>
<td>Submit FAFSA or fee waiver application – contact the financial aid office</td>
</tr>
<tr>
<td>Governor’s Fee Waiver</td>
<td></td>
<td>2. Be a CCC student</td>
<td></td>
</tr>
<tr>
<td>Extended Opportunity Programs and Services</td>
<td>Varies</td>
<td>1. Demonstrate financial need</td>
<td>Contact the financial aid office</td>
</tr>
<tr>
<td>(EOPS)</td>
<td></td>
<td>2. Be a CCC student</td>
<td></td>
</tr>
<tr>
<td>Cooperative Agencies Resources for Education</td>
<td>Varies</td>
<td>1. Demonstrate financial need</td>
<td>Contact the financial aid office</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2. Be a CCC student</td>
<td></td>
</tr>
</tbody>
</table>
# FEDERAL WORK STUDY DEFINED

Source: www.studentaid.ed.gov

<table>
<thead>
<tr>
<th>What is the Federal Work Study (FWS) Program?</th>
<th>Under the FWS Program, you can work part-time to earn money from the government for your education. The FWS Program:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>✓ Provides part-time employment while you are enrolled in school</td>
</tr>
<tr>
<td></td>
<td>✓ Helps pay your educational expenses</td>
</tr>
<tr>
<td></td>
<td>✓ Is available to undergraduate and graduate students who demonstrate financial need</td>
</tr>
<tr>
<td></td>
<td>✓ Is available to full-time or part-time students</td>
</tr>
<tr>
<td></td>
<td>✓ Is administered by schools participating in the FWS Program</td>
</tr>
<tr>
<td></td>
<td>✓ Encourages community service work and work related to your course of study</td>
</tr>
</tbody>
</table>

| Are Federal Work Study Jobs On-Campus or Off-Campus? | Both – if you work on campus, you’ll usually work for your school. If you work off campus, your employer will usually be a private nonprofit organization or a public agency, and the work performed must be in the public interest. Some schools may have agreements with private for-profit employers for FWS jobs. These jobs must be relevant to your course of study (to the maximum extent possible). |

<table>
<thead>
<tr>
<th>How Much Can I Earn?</th>
<th>You’ll earn at least the current federal minimum wage. However, the amount might be higher depending on the type of work you do and the skills required for the position.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Your Total FWS Award Depends On:</strong></td>
</tr>
<tr>
<td></td>
<td>✓ When you apply</td>
</tr>
<tr>
<td></td>
<td>✓ Your level of financial need</td>
</tr>
<tr>
<td></td>
<td>✓ Your school’s funding level. (Schools provide a certain amount of work-study funds; when all funds have been awarded, no additional work-study awards can be made for that year.)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>How Will I Be Paid?</th>
<th>Undergraduate student—by the hour</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Your school must pay you at least once a month</td>
</tr>
<tr>
<td></td>
<td>Your school must pay you directly unless you request that the school send your payments directly to your bank account or use the money to pay for your education-related institutional charges such as tuition, fees and room and board</td>
</tr>
</tbody>
</table>

| Can I Work as Many Hours as I Want? | No. The amount you earn cannot exceed your total FWS award. When assigning work hours, your employer or financial aid administrator will consider your class schedule and academic progress. |
# FEDERAL LOAN COMPARISON TABLE

Source: www.studentaid.ed.gov

<table>
<thead>
<tr>
<th>Borrower</th>
<th>Federal Perkins Loan (Subsidized)</th>
<th>Direct Subsidized Stafford Loan</th>
<th>Direct Unsubsidized Stafford Loan</th>
<th>Parent PLUS Loan</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Student</td>
<td></td>
<td></td>
<td>Parent of dependent undergraduate student</td>
</tr>
<tr>
<td><strong>Eligibility</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1.</td>
<td>Meet basic eligibility requirements for federal aid</td>
<td>1. Meet basic eligibility requirements for federal aid</td>
<td>1. Meet basic eligibility requirements for federal aid</td>
<td>1. Meet federal aid and credit eligibility requirements</td>
</tr>
<tr>
<td>2.</td>
<td>Demonstrate financial need</td>
<td>2. Demonstrate financial need</td>
<td>2. Be enrolled at least half-time</td>
<td>2. Student must be enrolled at least half-time</td>
</tr>
<tr>
<td>3.</td>
<td>Be enrolled at least part-time</td>
<td>3. Be enrolled at least half-time</td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Application Process</strong></td>
<td>Submit FAFSA</td>
<td></td>
<td></td>
<td>Submit FAFSA; Parents complete a Federal PLUS Loan application</td>
</tr>
<tr>
<td><strong>Maximum Loan Amount</strong></td>
<td>$5,500 (for undergraduates)</td>
<td><strong>Dependent Undergraduate:</strong></td>
<td><strong>Independent Undergraduate:</strong></td>
<td>Parents can borrow up to the cost of attendance minus any financial aid the student receives</td>
</tr>
<tr>
<td></td>
<td><strong>Year One:</strong> $5,500 (up to $3,500 subsidized, $2,000 unsubsidized)</td>
<td><strong>Year Two:</strong> $6,500 (up to $4,500 subsidized, $2,000 unsubsidized)</td>
<td><strong>Year One:</strong> $9,500 (up to $3,500 subsidized, $6,000 unsubsidized)</td>
<td><strong>Year Two:</strong> $10,500 (up to $4,500 subsidized, $6,000 unsubsidized)</td>
</tr>
<tr>
<td></td>
<td><strong>Year Three and Beyond:</strong> $7,500 (up to $5,500 subsidized, $2,000 unsubsidized)</td>
<td><strong>Year Three and Beyond:</strong> $7,500 (up to $5,500 subsidized, $2,000 unsubsidized)</td>
<td><strong>Years Three and up:</strong> $12,500 (up to $5,500 subsidized, $7,000 unsubsidized)</td>
<td></td>
</tr>
<tr>
<td><strong>Interest Rate</strong></td>
<td>5%; fixed</td>
<td>4.66%; fixed</td>
<td>4.66%; fixed</td>
<td>7.21%; fixed</td>
</tr>
<tr>
<td><strong>Grace period</strong></td>
<td>Nine months after graduation or dropping to less than half-time enrollment</td>
<td>Six months after graduation, leaving school, or enrolling less than half time</td>
<td>Six months after graduation, leaving school, or enrolling less than half time. Interest or loan payments can be made before this time</td>
<td>60 days after the last loan disbursement; payments can be deferred until six months after graduation or post-enrollment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Subsidized Loans</strong></th>
<th><strong>Unsubsidized Loans</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Loans awarded based on financial need; the government pays the interest of the loan during college enrollment and the grace period</td>
<td>Interest accrues during college enrollment and the grace period</td>
</tr>
</tbody>
</table>
### Purpose
In this lesson, students reflect upon the advantages and disadvantages of various types of financial aid including scholarships, grants, work study, and loans.

<table>
<thead>
<tr>
<th>Suggested Grade Level:</th>
</tr>
</thead>
<tbody>
<tr>
<td>11</td>
</tr>
</tbody>
</table>

### Materials and Handouts
Handout 6 Student Reflection

<table>
<thead>
<tr>
<th>Approximate Time Needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>15 minutes</td>
</tr>
</tbody>
</table>

### Student-Facing Instructions
Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

**Part 1:**
Talk with your parent/guardian about the different types of financial aid you learned about.

**Part 2:**
Write a one-page reflection in which you address the following questions:

- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- Summarize your conversation with your parent/guardian. Do you have new or different insights after your conversation?
- What next steps can you take based on what you learned and discussed?
Teacher Resource

**Teacher Notes**
This lesson is 2nd in a 2-lesson series called Financial Aid 101.

**Formative Assessment**

Experience/Understanding reflection aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

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Instructions

Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

Part 1:
Talk with your parent/guardian about the different types of financial aid you learned about.

Part 2:
Write a one-page reflection in which you address the following questions:

- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- Summarize your conversation with your parent/guardian. Do you have new or different insights after your conversation?
- What next steps can you take based on what you learned and discussed?
STUDENT REFLECTION

In today's workshop, I learned about:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

The most helpful piece of information I learned was:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

After today's workshop, I plan to:

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

<table>
<thead>
<tr>
<th>HOMEWORK</th>
<th>PRE-WORK FOR WORKSHOP ON:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discuss the financial aid spectrum activity with your parent(s), explaining why certain financial aid is more preferable than others.</td>
<td></td>
</tr>
</tbody>
</table>
Scholarship Basics Part 1: Scholarship Self-Assessment

Purpose

Students will identify their attitudes, perceptions, and definition of scholarships.

Suggested Grade Level:

11

Materials and Handouts

Scholarship Reflection

Approximate Time Needed:

15 minutes

Student-Facing Instructions

Complete the handout below individually and share your answers with your small group.

Teacher Notes

This lesson is 1st in a 4-lesson series called Scholarship Basics.

BREAKOUT 1: RECAP AND SCHOLARSHIP REFLECTION (15 minutes)

MENTOR:

☑ Do a small group introduction, if appropriate.

☑ SCHOLARSHIP REFLECTION: Ensure students complete and discuss the “Scholarship Reflection” handout. An answer key is provided under Assessment Notes.

☑ In addition to review the answers, highlight the following during your debrief:

While searching, applying, and interviewing for scholarships does require time, once you have the most frequently used materials (e.g. personal statement, transcript, recommendation letters), you can generally re-purpose these for other scholarships.

Students may have an impression that scholarships are a form of charity – reassure students that being select-

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ed as a scholarship recipient is a huge honor! Among the dozens, hundreds, or even thousands of applicants, a scholarship selection committee believes you best represent the type of scholar they want to support and want to help contribute financially to your college education.

There may be an assumption that scholarships are based solely on academics. Let students know that there are scholarships for just about anything – these can range from athletics, community service, leadership, a particular major/area of study, or being the first to attend college, just to name a few.

MENTOR TIP:

While it is important that students have a solid understanding of what a scholarship is and some basics about what is entailed to apply for one, it is also crucial as a Mentor to understand their attitude toward scholarships and financial aid. Unless students see value in what scholarships offer, they won’t search or apply for them.

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.
SCHOLARSHIP REFLECTION
(Answer Key)

Directions: Complete the handout below individually and share your answers with your small group.

If someone asked you what a scholarship was, how would you respond?
Scholarships are free money that covers your college expenses. Securing scholarships could reduce the amount you need to borrow or hours you need to work as a college student. Scholarships are funded by a variety of groups including colleges, schools, corporations, or community organizations.

What comes to mind when you hear the word “scholarship”?
Many students will think of scholarships as free money to pay for college costs. Some students will associate scholarships with the additional work needed to apply for the funding including essays, supplemental materials, and potentially an interview process. Be aware that some students or their families may look at scholarships as a form of charity and may be hesitant or even resistant to the notion of applying for this form of aid.

Who is eligible to receive a scholarship? How would you go about applying for a scholarship?
Scholarship eligibility can be based on a number of criteria including financial need, merit (such as having a strong academic record, demonstrated leadership, community service, or athletics), or even your area of study. AB540 (undocumented) students are eligible to receive scholarships but they should carefully review the application to verify that no social security number is required.

To apply for a scholarship, the student should first review the eligibility criteria to confirm that they are a good candidate. He/she would likely need to complete an online or paper application and may be asked to answer essay questions and or provide supplemental materials (i.e. transcript, recommendation letter, FAFSA confirmation page, etc.) After submitting the application, students may be invited to interview with a scholarship committee – not all scholarships have an interview stage. Some scholarships are renewable so students can get multi-year funding. Each scholarship’s criteria, award amount, and timeline vary.

Are there any downsides to scholarships?
Scholarship applications do require a greater time investment than some other types of aid, but they are a great way to pay for college. Applicants should beware of scholarship scams and should never pay money to find, apply, or receive a scholarship. Be on the lookout for:

- Companies that guarantee you will receive a scholarship by paying an application or other fee
- Websites that charge you for financial aid information that you can access for free
- Companies that ask for your financial, credit card, or bank account information

For more information on scholarship scams, visit www.ftc.gov/scholarshipscams
Complete the handout below individually and share your answers with your small group.
SCHOLARSHIP REFLECTION

Directions: Complete the handout below individually and share your answers with your small group.

If someone asked you what a scholarship was, how would you respond?

________________________________________________________

________________________________________________________

________________________________________________________

________________________________________________________

What comes to mind when you hear the word “scholarship”?

________________________________________________________

________________________________________________________

________________________________________________________

________________________________________________________

Who is eligible to receive a scholarship? How would you go about applying for a scholarship?

________________________________________________________

________________________________________________________

________________________________________________________

________________________________________________________

Are there any downsides to scholarships?

________________________________________________________

________________________________________________________

________________________________________________________

________________________________________________________

For more information on scholarship scams, visit www.ftc.gov/scholarshipscams
Scholarship Basics Part 2: Determining Your Scholarship Eligibility

Purpose
Students will determine their scholarship eligibility and learn how they can track scholarships they have identified or applied to.

Suggested Grade Level:
11

Materials and Handouts
Determining Your Scholarship Eligibility

Approximate Time Needed:
10 minutes

Student-Facing Instructions
Complete the table below to assess your scholarship eligibility. Remember, scholarships are awarded based on a number of criteria, not just academics.

Teacher Notes
This lesson is 2nd in a 4-lesson series called Scholarship Basics.

BREAKOUT 2: SCHOLARSHIP ELIGIBILITY (10 minutes)

TRAINER: Provide directions for “Breakout 2” linking this back to some of the highlights students shared in “Breakout 1.”

MENTOR TIP:

For California students: Highlight that scholarship opportunities are available to AB540 students. Since federal aid is not available to them, AB540 students may rely more heavily on scholarships to cover their college costs and should be aggressive in applying to scholarships they are eligible for.

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Teacher Resource

MENTOR: Students have 8 minutes to complete and discuss the “Determining Your Scholarship Eligibility” handout. The goal of this table is to get students thinking about what makes them unique as a scholarship candidate. Once students determine their eligibility, have them circle some scholarship websites that may be of interest to them.

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.

Assessment

Completion of worksheet
Instructions

Complete the table below to assess your scholarship eligibility. Remember, scholarships are awarded based on a number of criteria, not just academics.
# Determining Your Scholarship Eligibility

**Directions:** Complete the table below to assess your scholarship eligibility. Remember, scholarships are awarded based on a number of criteria, not just academics.

<table>
<thead>
<tr>
<th>Eligibility Criteria</th>
<th>Response</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is your GPA?</td>
<td>A strong GPA may qualify you for a number of local and national scholarships.</td>
<td></td>
</tr>
<tr>
<td>Do you qualify for free or reduced lunch?</td>
<td>If “Yes,” you may be eligible for other scholarships that take financial need into consideration.</td>
<td></td>
</tr>
<tr>
<td>What is your ethnicity?</td>
<td>Many scholarships support students of color.</td>
<td></td>
</tr>
<tr>
<td>What is your intended major?</td>
<td>Some scholarships (local, national, and even colleges) support students entering a specific area of study.</td>
<td></td>
</tr>
<tr>
<td>What extra-curricular activities have you participated in?</td>
<td>Many scholarships search for well-rounded students who excel outside of the classroom. Scholarship may target leadership, athletic ability, community service, etc.</td>
<td></td>
</tr>
<tr>
<td>Which college(s) have you applied to?</td>
<td>Visit your college websites to see if you are eligible for any institutional scholarships.</td>
<td></td>
</tr>
</tbody>
</table>

## Helpful Scholarship Websites:

<table>
<thead>
<tr>
<th>General Scholarships</th>
<th><a href="http://www.glowfoundation.org/students/scholarships/scholarships-listing/">www.glowfoundation.org/students/scholarships/scholarships-listing/</a></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><a href="http://www.fastweb.com">www.fastweb.com</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://bigfuture.collegeboard.org/scholarship-search#1welcome">bigfuture.collegeboard.org/scholarship-search#1welcome</a></td>
</tr>
</tbody>
</table>

| Bay Area/ Northern CA Scholarships         | [siliconvalleycf.org/scholarships](http://siliconvalleycf.org/scholarships)                                                    |
|                                           | [www.eastbayconsortium.org * click on “Scholarship Directory”](http://www.eastbayconsortium.org)                             |
|                                           | [http://www.girlscoutsnorcal.org/girls/scholarships](http://www.girlscoutsnorcal.org/girls/scholarships)                    |

| Southern California Scholarships          | [www.heef.org](http://www.heef.org)                                                                                          |
|                                           | [www.utla.net/scholarships](http://www.utla.net/scholarships)                                                               |
|                                           | [www.rmhscsc.org/scholarships.php](http://www.rmhscsc.org/scholarships.php)                                                   |

| AB540 Scholarships and Resources          | [www.usc.edu/dept/chepa/pdf/AB%20540%20final.pdf](http://www.usc.edu/dept/chepa/pdf/AB%20540%20final.pdf)                  |
|                                           | [www.e4fc.org/images/E4FC_Scholarships.pdf](http://www.e4fc.org/images/E4FC_Scholarships.pdf)                                |
|                                           | [www.finaid.org/otheraid/undocumented.phtml](http://www.finaid.org/otheraid/undocumented.phtml)                           |
|                                           | [http://www.maldef.org/assets/pdf/1415_MALDEF_Scholarship.pdf](http://www.maldef.org/assets/pdf/1415_MALDEF_Scholarship.pdf) |
Teacher Resource

Scholarship Basics Part 3: Tracking Your Scholarships

Purpose
Students will begin filling out a scholarship application.

Suggested Grade Level:
11

Materials and Handouts
Tracking Your Scholarships

Approximate Time Needed:
20+ minutes

Student-Facing Instructions
Begin researching and applying for scholarships based on your eligibility. Use the table below to record you scholarship information.

Teacher Notes
This lesson is 3rd in a 4-lesson series called Scholarship Basics.

BREAKOUT 3: SCHOLARSHIP SEARCH/APPLICATIONS (20+ minutes)

MATERIALS NEEDED: Computers for each student with Internet access

TRAINER: Provide directions for “Breakout 3.” Students will spend the remaining time (approximately 20 minutes – more if the session length has been extended for students to research or apply for a scholarship) logging on to a computer and searching for scholarships they are eligible for. Instruct them to start with the websites they circled on the “Determining Your Scholarship Eligibility” handout. Once they find a scholarship, students will log the information on the “Tracking Your Scholarships” handout. Note the table headers and also point out the AB540 scholarship tips (California-specific).

MENTOR: Circulate among your group to make sure students are on track. Be sensitive to AB540 students (California-specific) who may be primarily relying on scholarships to fund their college education.

MENTOR TIP: If there is a specific scholarship application you would like students to work on and/or complete,
they can do that at this time.

TRAINER: Provide a time check when two minutes remain.

Assessment
Completion of worksheet
Instructions

Begin researching and applying for scholarships based on your eligibility. Use the table below to record your scholarship information.
TRACKING YOUR SCHOLARSHIPS

Directions: Begin researching and applying for scholarships based on your eligibility. Use the table below to record your scholarship information.

<table>
<thead>
<tr>
<th>Scholarship Name</th>
<th>Due Date</th>
<th>Website</th>
<th>Materials Needed</th>
</tr>
</thead>
</table>

TIPS FOR AB540 (UNDOCUMENTED) STUDENTS:

- **Review the Eligibility Criteria**: Review the requirements carefully before taking the time to apply.
- **Apply Early**: Start your scholarship search as early as possible. Begin your search while in high school and start local, looking for scholarships offered within your school district and local community.
- **Visit College Websites**: Many colleges, even private colleges, offer assistance for undocumented students. It’s never too early to ask questions and be prepared.
- **Get a Status Update**: Connect with agencies offering free immigration services to get information about your status. Some undocumented students may be eligible to apply for residency and not know it, so find out for yourself. Start with local community-based organizations and use caution when sharing your personal information.
### Scholarship Basics Part 4: Student Reflection

#### Purpose
In this lesson, students reflect upon their scholarship eligibility and their next steps in their scholarship applications.

#### Materials and Handouts
Student Reflection

#### Suggested Grade Level:
11

#### Approximate Time Needed:
5 minutes

#### Student-Facing Instructions
Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a one-page reflection in which you address the following questions:
  - What information resonated with you about today’s workshop?
  - What information was new to you?
  - What information was most helpful to learn about? Why?
  - What knowledge can you pass on or share with family members?
  - What next steps can you take based on what you learned?

#### Teacher Notes
This lesson is 4th in a 4-lesson series called Scholarship Basics.

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Formative Assessment

Experience/Understanding reflection aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions
Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a one-page reflection in which you address the following questions:
- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- What knowledge can you pass on or share with family members?
- What next steps can you take based on what you learned?

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STUDENT REFLECTION

In today’s workshop, I learned:

1. ____________________________________________________________________________

2. ____________________________________________________________________________

3. ____________________________________________________________________________

The most helpful piece of information I learned was:

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

After today’s workshop, I plan to:

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

_______________________________________________________________________________

<table>
<thead>
<tr>
<th>HOMEWORK</th>
<th>PRE-WORK FOR WORKSHOP ON:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Talk with your parent(s) about what scholarships are and the value of applying early.</td>
<td>______________</td>
</tr>
</tbody>
</table>
Unit Culminating Task:  
Understanding College Financial Aid Options  
Poster Project & Presentation

Purpose
The purpose of this task is for students to synthesize what they’ve learned about college costs and the variety of ways to finance them.

Suggested Grade Level: 11

Materials and Handouts
Notes and reflections from prerequisite lessons

Approximate Time Needed: Varies

Student-Facing Instructions
Use your notes and reflections from the following lessons:
• Case Studies: Funding Their Education
• College Costs
• Paying for College
• Scholarship Basics
• Financial Aid 101: Comparing Financial Aid

Create an informative and engaging poster that describes what you’ve learned about these financial aid topics. Tailor your poster to one of the following audiences:
• Parents/Guardians
• Younger Siblings
• Other

Be sure to include information that you learned and what actions or steps your audience members should know about or take.

Teacher Notes
Unit Culminating Task Prerequisites: The depth of this culminating task is dependent on which financial aid lessons were taught beforehand, including “Case Studies: Funding Their Education”, “College Costs”, “Paying for College”, “Scholarship Basics”, and “Financial Aid 101: Comparing Financial Aid”.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Poster assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Presents perspective with supportive evidence
- Uses digital media/visual displays to engage and support audience understanding

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Use your notes and reflections from the following lessons:
- Case Studies: Funding Their Education
- College Costs
- Paying for College
- Scholarship Basics
- Financial Aid 101: Comparing Financial Aid

Create an informative and engaging poster that describes what you’ve learned about these financial aid topics. Tailor your poster to one of the following audiences:
- Parents/Guardians
- Younger Siblings
- Other

Be sure to include information that you learned and what actions or steps your audience members should know about or take.
Understand and Successfully Complete FAFSA and Other Financial Aid Applications

Purpose
Students will define the terms “grants” and “work-study” and review strategies for maximizing financial aid.

Suggested Grade Level:
12

Materials and Handouts
Financial Aid 101
Federal Work Study Defined

Approximate Time Needed:
20 minutes

Student-Facing Instructions
Work with your small group to define the terms below in 1-2 sentences. Consider specific similarities and differences between grants and work study as you come up with your definitions.

Teacher Notes
This lesson is 1st in a 2-lesson series called Federal Grants and Work Study. Some information in the handouts is California-specific.

BREAKOUT 1: RECAP AND FINANCIAL AID 101 (10 minutes)

MENTOR:
Do a small group introduction, if appropriate.
FINANCIAL AID 101: Ensure students complete and discuss the “Financial Aid 101” handout. Be sure to cover the basic strategies for maximizing student aid. If students covered the “Financial Aid 101” module, what do they remember about these types of aid? In what ways are they different? An answer key is provided on page 6 for your reference.

MENTOR TIP: Reiterate that certain types of financial aid are more advantageous than others. Always accept free aid (grants and scholarships) first and borrowed aid last.

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief

---

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FINANCIAL AID 101
(Answer Key)

Directions: Work with your small group to define the terms below in 1-2 sentences. Consider specific similarities and differences between grants and work study as you come up with your definitions.

Financial Aid is: Any type of funding that helps cover your total cost of attendance (e.g. tuition, fees, books, room and board, transportation, etc.) It is typically divided into three categories: money you receive (e.g. grants and scholarships), money you earn (e.g. work study), and money you borrow (e.g. federal loans). Completing the FAFSA automatically applies for most federal and state aid programs.

Strategies to Maximize Your Financial Aid:
1. Complete your FAFSA/California Dream Application (and GPA verification form for the Cal Grant) as close to January 1st as possible. California’s priority deadline is March 2nd.
2. Apply for local and national scholarships.
3. Talk to your family about attending and paying for college.

One type of financial aid is called a grant. A Grant is: free money that covers your college expenses. Grants are awarded based on financial need and multiple grants can be awarded to a student. You are notified of any grants you are eligible to receive in your financial aid award letter.

Another type of financial aid is work study. Work study is: money that is earned from a part-time job on or off campus. There are many benefits to work study such as having flexible work hours. Work study is also offered to students in their financial aid award letter.

Remember: Free Money > Earned Money > Borrowed Money

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Instructions

Work with your small group to define the terms below in 1-2 sentences. Consider specific similarities and differences between grants and work study as you come up with your definitions.
FINANCIAL AID 101

Directions: Work with your small group to define the terms below in 1-2 sentences. Consider specific similarities and differences between grants and work study as you come up with your definitions.

Financial Aid is: _____________________________________________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Strategies to Maximize Your Financial Aid:
1. Complete your FAFSA/California Dream Application (and GPA verification form for the Cal Grant) as close to January 1st as possible. California’s priority deadline is March 2nd.
2. Apply for local and national scholarships.
3. Talk to your family about attending and paying for college.

One type of financial aid is called a grant. A Grant is: _____________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Another type of financial aid is work study. Work study is: _________________________
__________________________________________________________________________
__________________________________________________________________________
__________________________________________________________________________

Remember: Free Money > Earned Money > Borrowed Money
### FEDERAL WORK STUDY DEFINED

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

<table>
<thead>
<tr>
<th>What is the Federal Work Study (FWS) Program?</th>
<th>Under the FWS Program, you can work part-time to earn money from the government for your education. The FWS Program:</th>
</tr>
</thead>
</table>
|                                               | ☑ Provides part-time employment while you are enrolled in school  
|                                               | ☑ Helps pay your educational expenses  
|                                               | ☑ Is available to undergraduate and graduate students who demonstrate financial need  
|                                               | ☑ Is available to full-time or part-time students  
|                                               | ☑ Is administered by schools participating in the FWS Program  
|                                               | ☑ Encourages community service work and work related to your course of study |
| Are Federal Work Study Jobs On-Campus or Off-Campus? | Both – if you work on campus, you’ll usually work for your school. If you work off campus, your employer will usually be a private nonprofit organization or a public agency, and the work performed must be in the public interest. Some schools may have agreements with private for-profit employers for FWS jobs. These jobs must be relevant to your course of study (to the maximum extent possible). |
| How Much Can I Earn? | You’ll earn at least the current federal minimum wage. However, the amount might be higher depending on the type of work you do and the skills required for the position. |
| | **Your Total FWS Award Depends On:**  
| | ☑ When you apply  
| | ☑ Your level of financial need  
| | ☑ Your school’s funding level. (Schools provide a certain amount of work-study funds; when all funds have been awarded, no additional work-study awards can be made for that year.) |
| How Will I Be Paid? | ☑ Undergraduate student—by the hour  
| | ☑ Your school must pay you at least once a month  
| | ☑ Your school must pay you directly unless you request that the school send your payments directly to your bank account or use the money to pay for your education-related institutional charges such as tuition, fees and room and board |
| Can I Work as Many Hours as I Want? | No. The amount you earn cannot exceed your total FWS award. When assigning work hours, your employer or financial aid administrator will consider your class schedule and academic progress. |
Federal Grants and Work Study Part 2: Financial Aid Comparison

Purpose
The purpose of this lesson is for students to understand basic facts about different grant programs and work study through their group presentations.

Suggested Grade Level:
12

Materials and Handouts
Financial Aid Comparison Table
Financial Aid Reference Materials
FAFSA Overview

Approximate Time Needed:
15 minutes

Student-Facing Instructions
Each small group will be assigned with a specific financial aid program to research. Answer the questions in the table below as it relates to your financial aid. Utilize the “Financial Aid Reference Materials” as well as any knowledge you or your group members have about the financial aid. As the other groups present, jot down notes in the appropriate column.

Teacher Notes
This lesson is 2nd in a 2-lesson series called Federal Grants and Work Study.

BREAKOUT 2: FINANCIAL AID PRESENTATION PREP (15 minutes)

MATERIALS NEEDED: Chart paper, markers

TRAINER: Provide directions for “Breakout 2.” Each group will be assigned to research a specific aid program and will have 10 minutes to prepare a 1 minute presentation focusing on the key characteristics of that financial aid. Students will use the “Financial Aid Comparison Table” and “Financial Aid Reference Materials” to get started. Students will log their responses (1) on their handout and (2) on the provided chart paper which will be a visual aid for the presentation. While each group presents, the rest of the class will take notes on the “Financial Aid Comparison Table” handout. Assign each small group to one of the financial aid programs below:

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Teacher Resource

- Federal Pell Grant
- Federal Supplemental Educational Opportunity Grant (FSEOG)
- Federal TEACH Grant
- Federal Work Study (FWS)

MODIFICATIONS:

- Small Group Presentations: If this format is not conducive for your classroom, have students complete the table in their small group. Each person is responsible for researching a specific aid program and presenting it to their small group.
- If there are five groups: Have the fifth group answer the FAFSA questions at the bottom of the “Financial Aid Comparison Table” handout.
- If there are more than five groups: Although this lesson focuses on federal grants, you could also have a team/teams present on Cal Grants if you need additional topics.
- If you are tight on time: Assign the same type of financial aid to multiple groups to speed up the presentation time in the next breakout.

MENTOR: Work with your small group to help students put together their presentations and address any immediate questions. An answer key for the “Financial Aid Comparison Table” is provided on page 7. Ensure that each group member is contributing to the discussion and ask clarifying questions where needed. Be sure that students have logged their responses and prepared their chart paper before the time is up. If students finish early, have them research another aid category.

TRAINER: Provide a two minute time check before calling the class together.

FINANCIAL AID PRESENTATIONS (20 minutes)

TRAINER: As there are at least four presentations to complete, be strict on the time allocated to each aid program. 3-4 minutes should be spent on each financial aid type including (1) student presentations, (2) quick facts, and (3) Mentor perspectives. Remember to engage the Mentors and utilize them to provide real life examples and scenarios.

Call the “Federal Pell Grant” team to the front of the room. They have 1 minute to share the key characteristics of this aid program. If there is an additional “Federal Pell Grant” team, have the second team present any information that differed. If the following specifics were missed, address these quick facts with the class after the student presentation(s) concludes:

- Free money for school
- Awards a maximum of $5,730/year
- Eligibility: Must be a U.S. citizen or conditional alien and demonstrate financial need; for students pursuing their first bachelor’s degree
- Submit FAFSA by Mar. 2nd to apply

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Teacher Resource

Call the “FSEOG” team(s) to present. Quick facts:

- Free money for school
- Awards a maximum of $4,000/year
- Eligibility: Must be a U.S. citizen or conditional alien and demonstrate financial need; Pell Grant recipients receive priority
- Submit FAFSA by Mar. 2nd to apply

Call the “Federal TEACH Grant” team(s) to present. Quick facts:

- Free money for school
- Awards a maximum of $4,000/year
- Eligibility: Must be a U.S. citizen or conditional alien and demonstrate financial need; pursue a career in teaching – must serve at least four years in a high need school or service industry
- Submit FAFSA by Mar. 2nd to apply

Call up any additional groups to present their specific grant program. If you don’t have a group presenting on Cal grants, point out that additional information about Cal grants and other California aid programs are included in the handouts. Many of these grant programs have similar criteria and allow students to receive more than one grant at a time – they can really add up! Time permitting, ask Mentors to share any tips or experiences as it relates to grants.

Call the “Federal Work Study” team(s) to present. Quick facts are below. Time permitting, ask mentors to share any tips or experiences as it relates to work study. If any mentors did work study while in college, invite them to share what position they had and how they went about getting that job. Are there other work study positions they remember?

- Earned money for school
- Award amount varies
- Eligibility includes: Must be a U.S. citizen or conditional alien and demonstrate financial need
- Submit FAFSA by Mar. 2nd to apply

Call up any additional groups to present (i.e. FAFSA or state aid grants).

MENTOR: While the presentations are happening, support the Trainer in making sure that students are completing their “Financial Aid Comparison Table” handout. Share any real life examples as it relates to grants and work study. Work study, in particular, may be an abstract concept to students so any tangible details you share as it relates to a part-time job will be helpful.

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**FINANCIAL AID COMPARISON TABLE**
(Answer Key)

**Directions:** Each small group will be assigned with a specific financial aid program to research. Answer the questions in the table below as it relates to your financial aid. Utilize the “Financial Aid Reference Materials” as well as any knowledge you or your group members have about the financial aid. As the other groups present, jot down notes in the appropriate column.

<table>
<thead>
<tr>
<th></th>
<th>Federal Pell Grant</th>
<th>Federal Supplemental Educational Opportunity Grant (FSEOG)</th>
<th>Federal TEACH Grant</th>
<th>Federal Work Study (FWS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the money free, earned, or borrowed?</td>
<td>Free money</td>
<td>Free money</td>
<td>Free money</td>
<td>Earned money</td>
</tr>
<tr>
<td>Where does the money come from?</td>
<td>Federally funded</td>
<td>Federally funded</td>
<td>Federally funded</td>
<td>Federally funded</td>
</tr>
<tr>
<td>How much is the award?</td>
<td>Maximum: $5,730/year</td>
<td>Maximum: $4,000/year</td>
<td>Maximum: $4,000/year</td>
<td>Award amount varies depending on when you apply, level of financial need, and amount of funds available</td>
</tr>
<tr>
<td>How do you apply?</td>
<td>Complete the FAFSA to apply</td>
<td>Complete the FAFSA to apply</td>
<td>Complete the FAFSA to apply</td>
<td>Complete the FAFSA to apply</td>
</tr>
<tr>
<td>What are the general eligibility requirements?</td>
<td>U.S. citizen or other eligible resident Need-based</td>
<td>U.S. citizen or other eligible resident Need-based</td>
<td>U.S. citizen or other eligible resident Need-based</td>
<td>U.S. citizen or other eligible resident Need-based</td>
</tr>
<tr>
<td>Can you get more than one?</td>
<td>No</td>
<td>NO</td>
<td>No</td>
<td>No, you hold one work study position at a time</td>
</tr>
</tbody>
</table>

What is the FAFSA and why is it important? When should it be completed? If I don’t qualify for the FAFSA, what can I qualify for?

*The Free Application for Federal Student Aid (FAFSA)* is a free application used to apply for federal and most state aid programs including grants, work study, and loans. As mentioned above, the FAFSA is used to qualify for Pell grant, FSEOG, Teach grant, and work study among other types of aid. If you live in California, the FAFSA is one of two items you need to submit in order to receive the Cal grant. The FAFSA is released on January 1st each year and should be submitted online by March 2nd. In California, undocumented students should complete the California Dream Act Application to apply for state and university grants, fee waivers, and scholarships.

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Instructions

Each small group will be assigned with a specific financial aid program to research. Answer the questions in the table below as it relates to your financial aid. Utilize the “Financial Aid Reference Materials” as well as any knowledge you or your group members have about the financial aid. As the other groups present, jot down notes in the appropriate column.
**FINANCIAL AID COMPARISON TABLE**

*Directions:* Each small group will be assigned with a specific financial aid program to research. Answer the questions in the table below as it relates to your financial aid. Utilize the “Financial Aid Reference Materials” as well as any knowledge you or your group members have about the financial aid. As the other groups present, jot down notes in the appropriate column.

<table>
<thead>
<tr>
<th></th>
<th>Federal Pell Grant</th>
<th>Federal Supplemental Educational Opportunity Grant (FSEOG)</th>
<th>Federal TEACH Grant</th>
<th>Federal Work Study (FWS)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the money free, earned, or borrowed?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Where does the money come from?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How much is the award?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do you apply?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>What are the general eligibility requirements?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you get more than one?</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What is the FAFSA and why is it important? When should it be completed? If I don’t qualify for the FAFSA, what can I qualify for?

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________

________________________________________________________________________________________
# Financial Aid Reference Materials

## Federal and State Grant Programs

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Award Amount</th>
<th>Eligibility</th>
<th>Application Process</th>
</tr>
</thead>
</table>
| Federal Pell Grant | Maximum: $5,730/year | 1. Be a U.S. citizen or conditional alien  
2. Demonstrate financial need  
3. For students pursuing their first bachelor’s degree | Submit FAFSA |
| Federal Supplemental Educational Opportunity Grant (FSEOG) | Maximum: $4,000/year | 1. Be a U.S. citizen or conditional alien  
2. Demonstrate financial need  
3. Pell Grant recipients given priority | Submit FAFSA |
| Federal TEACH Grant | Maximum: $4,000/year | 1. Be a U.S. citizen or conditional alien  
2. Be an undergraduate, graduate, or post-baccalaureate student pursuing a teaching career  
3. Agree to serve at least four years as a full-time teacher in a high need field (school or educational service industry) serving low-income students  
4. Meet academic requirements | Submit FAFSA |
| Cal Grant A | UC: up to $12,192/year  
Private: up to $8,056/year  
CSU: up to $5,472/year | 1. Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria  
2. Be a California resident when you graduated from high school or meet AB540 criteria  
3. Have a SSN or meet AB540 criteria  
4. Demonstrate financial need  
5. Attend a qualifying California college  
6. Be an undergraduate student  
7. Meet the 3.0 high school GPA requirement | Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2nd |
| Cal Grant B | Maximum: $1,473 for year one  
Tuition/fee award in the same amount as Cal Grant A after year one. | 1. Meet criteria 1-6 (from Cal Grant A)  
2. Meet the 2.0 high school GPA requirement | Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2nd |
| Cal Grant C | Maximum: $547 for books, tools, or equipment at an occupational or career technical school  
Maximum: $2,462 for tuition | 1. Meet criteria 1-4 (from Cal Grant A)  
2. For students attending technical or career schools (AA and Certificate programs only) | Submit FAFSA (Dream Application for AB540 students) and Cal Grant C Supplement Form |
## OTHER CALIFORNIA AID PROGRAMS

<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Award Amount</th>
<th>Eligibility</th>
<th>Application Process</th>
</tr>
</thead>
</table>
| California Chafee Grant                         | Minimum: $5,000/year for job training or college up to cost of attendance | 1. Demonstrate financial need  
2. Student was in foster care between ages 16-18  
3. Be enrolled in school at least half-time | Submit FAFSA (Dream Application for AB540 students) and Chafee Grant Application |
| Child Development Grant                         | California Community College: $1,000/year  
Four-Year College: $2,000/year                    | 1. Demonstrate financial need  
2. Be nominated by an eligible postsecondary institution or by the employing agency  
3. Be pursuing a child development permit and plan to work at a licensed children’s center in California | Submit FAFSA and Child Development Grant Application |
| Law Enforcement Personnel Dependents Grant      | Awards match the amount of Cal Grants; range from $100 to $12,192 for up to four years | 1. Demonstrate financial need  
2. Be a spouse or dependent of a California peace officer, firefighter, or specified law enforcement employee who died or became completely disabled in the line of duty | Submit FAFSA and Law Enforcement Personnel Dependents Grant Application |
| California National Guard Education Assistance Award Program | ³UC: up to $12,192  
⁴Private: up to $12,192  
⁵CSU: up to $5,472  
⁶CCC: up to $1,648 | 1. Demonstrate financial need  
2. Be a California resident  
3. Have two years of qualifying military service with the California National Guard, State Military Reserve, or Naval Militia  
4. Minimally enroll in three units/term | Submit FAFSA and California National Guard Education Assistance Award Program application by June 14 |
| University of California (UC) State Aid         | Varies                                           | 1. Demonstrate financial need  
2. Be a UC undergraduate or graduate student | Contact your UC’s financial aid office |
| California State University (CSU) Grant         | Varies – helps covers CSU tuition fees            | 1. Demonstrate financial need  
2. Be a CSU undergraduate or graduate student | Contact the financial aid office |
| Educational Opportunity Program (EOP) Grant     | Maximum: $2,000                                  | 1. Demonstrate financial need  
2. Be a CSU undergraduate student admitted through EOP | Contact the financial aid office |
| California Community College (CCC) Board of Governor’s Fee Waiver | Varies – helps cover registration fees | 1. Demonstrate financial need  
2. Be a CCC student | Submit FAFSA or fee waiver application – contact the financial aid office |
| Extended Opportunity Programs and Services (EOPS) | Varies                                           | 1. Demonstrate financial need  
2. Be a CCC student | Contact the financial aid office |
| Cooperative Agencies Resources for Education    | Varies                                           | 1. Demonstrate financial need  
2. Be a CCC student | Contact the financial aid office |
What is the FAFSA?
The Free Application for Federal Student Aid (FAFSA) is a free application used to apply for federal and most state aid programs including grants, work study, and loans. The FAFSA may also be used to determine a student’s eligibility for institutional aid from the college. The FAFSA asks questions about the student/family’s finances as well as the student’s college plans. Once the student submits their FAFSA, the information is shared with each college the student is interested in. The school then generates a financial aid award package based on the student’s financial need.

Who should submit the FAFSA?
Submit a FAFSA if you:
- are a U.S. citizen, U.S. national, or eligible non-citizen,
- are attending a participating college or school,
- are pursuing a degree or certificate in an eligible program and making academic progress,
- and have financial need – be safe and apply for FAFSA as you may qualify for federal programs

NOTE: If you are an undocumented student, do not complete the FAFSA online as this information is reported directly to the federal government.

How do I apply for the FAFSA?
Submit your FAFSA online at www.fafsa.ed.gov. If you include all required information and signatures, your FAFSA can be processed in as few as three days.

When is the FAFSA due?
Submit the 2015-16 FAFSA as close to January 1st as possible. Check your college websites to see their priority deadline. As a general benchmark, submit your FAFSA by March 2nd if you live in California.
Purpose

Students will learn basic information about the Cal Grant program including eligibility criteria, how to apply, key deadlines, and award amounts.

Suggested Grade Level:

12

Materials and Handouts

Handout 1 Introduction To Cal Grants
Handout 3 Cal Grant Awards And Amounts
Handout 4 Grant Comparison Table

Approximate Time Needed:

20 minutes

Student-Facing Instructions

Work with your small group to answer the questions below. Use the “Cal Grants Overview,” “Cal Grant Awards and Amounts,” and “Grant Comparison Table” handouts.

Teacher Notes

This lesson is California-specific. It is 1st in a 2-lesson series called Cal Grants and Dream Act/FAFSA. Check links as this information is updated yearly.

BREAKOUT 1: RECAP AND INTRODUCTION TO CAL GRANTS (20 minutes)

MENTOR:

Do a small group introduction, if appropriate.

INTRODUCTION TO CAL GRANTS: Ensure students complete and discuss the “Introduction to Cal Grants” handout. An answer key is provided on page 5. Refer students to the following handouts to collect additional information: “Cal Grants Overview,” “Cal Grant Awards and Amounts,” and “Grant Comparison Table.” Highlight the following:

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Teacher Resource

Cal Grants are free money that does not need to be repaid – review the award amounts
Students with a SSN and those who are undocumented (AB540) are eligible to apply
The priority deadline for submitting a FAFSA/California Dream Act Application AND verified GPA is March 2nd. Students can still submit their materials post-March 2nd but risk not getting awarded the full amount he/she may be eligible for.

Cal Grants received can only be used at eligible California institutions – if a student goes out-of-state for post-secondary education, they will lose their Cal Grant funding

Time permitting, review the supplemental handouts in greater detail

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.
INTRODUCTION TO CAL GRANTS  
(Answer Key)

**Directions:** Work with your small group to answer the questions below. Use the “Cal Grants Overview,” “Cal Grant Awards and Amounts,” and “Grant Comparison Table” handouts.

---

**Cal Grants At-a-Glance**

- **Official Website:** [www.calgrants.org](http://www.calgrants.org)
- **Priority Deadline:** March 2nd
- **The maximum amount you can receive from a Cal Grant is:** $12,192 per year (receiving Cal Grant A to attend a UC)

---

One type of financial aid is called a grant. A Grant is: *free money that covers your college expenses.* Grants are awarded based on financial need and multiple grants can be awarded to a student. You are notified of any grants you are eligible to receive in your financial aid award letter.

If someone asked you what a Cal Grant was, how would you respond? (HINT: Think about what a grant is and then consider what “Cal” could represent)

A Cal Grant is a type of financial aid that does not need to repaid. Funded by the California government, Cal Grants are available to graduating high schools seniors or recent graduates who meet the eligibility and application requirements and plan to attend a qualifying California university, college, or vocational program. For more details on Cal Grants, visit [www.calgrants.org](http://www.calgrants.org).

Who is eligible to receive a Cal Grant? How would you go about applying for a Cal Grant?

**Main criteria (consult full list on the “Cal Grants Overview” handout):**

- Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria
- Be a California resident when you graduated from high school or meet AB540 criteria
- Have a SSN or meet AB540 criteria
- Demonstrate financial need
- Attend a qualifying California college
- Be an undergraduate student
- Meet the high school GPA requirement (varies by type of Cal Grant)

**To apply:** Submit either a FAFSA or California Dream Act Application (not both) AND verified Cal Grant GPA by the March 2nd priority deadline.

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*Adapted from the GLOW Foundation Financial Literacy curriculum.*

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Instructions

Work with your small group to answer the questions below. Use the “Cal Grants Overview,” “Cal Grant Awards and Amounts,” and “Grant Comparison Table” handouts.
INTRODUCTION TO CAL GRANTS

Directions: Work with your small group to answer the questions below. Use the “Cal Grants Overview,” “Cal Grant Awards and Amounts,” and “Grant Comparison Table” handouts.

Cal Grants At-a-Glance

Official Website: ________________________________

Priority Deadline: ________________________________

The maximum amount you can receive from a Cal Grant is: $ _________ per year

One type of financial aid is called a grant. A Grant is: ________________________________

______________________________

______________________________

______________________________

If someone asked you what a Cal Grant was, how would you respond? (HINT: Think about what a grant is and then consider what “Cal” could represent)

______________________________

______________________________

______________________________

Who is eligible to receive a Cal Grant? How would you go about applying for a Cal Grant?

______________________________

______________________________

______________________________

______________________________

______________________________
### CAL GRANT AWARDS AND AMOUNTS

Source: [www.calgrants.org](http://www.calgrants.org) and [www.csac.ca.gov](http://www.csac.ca.gov)

<table>
<thead>
<tr>
<th></th>
<th>Entitlement Award</th>
<th>Competitive Award</th>
</tr>
</thead>
</table>
| Cal Grant A    | **Covers tuition and fees** at public and private colleges. Students must have a **minimum high school GPA of 3.0** and be working toward a two or four year degree. The award can be held in reserve while the student attends a California Community College.  
  ⊂ Maximum award amount for a CSU: $5,472  
  ⊂ For a UC: $12,192  
  ⊂ For a private school: $8,056 | For students from low-to-middle income families with a **minimum high school GPA of 3.0**. Awards (in the same amount as the Entitlement Award) help pay for **tuition and fees** at qualifying schools with academic programs of at least two years long. |
| Cal Grant B    | **The award provides low-income students with a minimum high school GPA of 2.0 with a living allowance and assistance with tuition and fees.** Awards can be used for two-year, four-year, and certificate programs.  
  ⊂ Most recipients are awarded a $1,473 stipend for books and living expenses regardless of the school he/she attends.  
  ⊂ After freshmen year, Cal Grant B covers tuition and fees in the same amount as Cal Grant A. | For low-income students with a **minimum high school GPA of 2.0**. Awards (in the same amount as the Entitlement Award) help pay for **tuition, fees, and access costs** at qualifying schools with programs at least one year in length.  
  ⊂ In year one, funds can be only be used for access costs such as living expenses, transportation, supplies, and books.  
  ⊂ In year two, the award can be put towards tuition and fees at qualifying schools. |
| Cal Grant C    | n/a                                                                                                                                                                                                            | For low-income students (average household income is $18,700). Eligibility is determined after the application has been considered for Cal Grant A and B. The award covers **tuition, fees, books and supplies at occupational or career technical schools**. Student must enroll in a vocational program at least four months long at a California Community College (CCC), private college, or career technical school. Funding is available for up to two years depending on program length.  
  ⊂ $547 award is available for books, tools, or equipment.  
  ⊂ Student may receive an additional $2,462 for tuition at a school other than a CCC. |

**NOTE:** To claim a Cal Grant Award, the student’s high school graduation date must be verified.  
⊂ The student’s high school or college attending can verify this  
⊂ The student can also submit a verification online OR complete the form and mail it to CSAC – students should check with their high school to see how this process is managed
# GRANT COMPARISON TABLE

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

## FEDERAL AND STATE GRANT PROGRAMS

<table>
<thead>
<tr>
<th>Grant Name</th>
<th>Award Amount</th>
<th>Eligibility</th>
<th>Application Process</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Pell Grant</td>
<td>Maximum: $5,730/year</td>
<td>1. Be a U.S. citizen or conditional alien&lt;br&gt;2. Demonstrate financial need&lt;br&gt;3. For students pursuing their first bachelor’s degree</td>
<td>Submit FAFSA</td>
</tr>
<tr>
<td>Federal Supplemental</td>
<td>Maximum: $4,000/year</td>
<td>1. Be a U.S. citizen or conditional alien&lt;br&gt;2. Demonstrate financial need&lt;br&gt;3. Pell Grant recipients given priority</td>
<td>Submit FAFSA</td>
</tr>
<tr>
<td>Educational Opportunity</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Grant (FSEOG)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal TEACH Grant</td>
<td>Maximum: $4,000/year</td>
<td>1. Be a U.S. citizen or conditional alien&lt;br&gt;2. Be an undergraduate, graduate, or post-baccalaureate student pursuing a teaching career&lt;br&gt;3. Agree to serve at least four years as a full-time teacher in a high need field (school or educational service industry) serving low-income students&lt;br&gt;4. Meet academic requirements</td>
<td>Submit FAFSA</td>
</tr>
<tr>
<td>Cal Grant A</td>
<td></td>
<td>1. Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria&lt;br&gt;2. Be a California resident when you graduated from high school or meet AB540 criteria&lt;br&gt;3. Have a SSN or meet AB540 criteria&lt;br&gt;4. Demonstrate financial need&lt;br&gt;5. Attend a qualifying California college&lt;br&gt;6. Be an undergraduate student&lt;br&gt;7. Meet the 3.0 high school GPA requirement</td>
<td>Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2&lt;sup&gt;nd&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td><strong>UC</strong>: up to $12,192/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>Private</strong>: up to $8,056/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td><strong>CSU</strong>: up to $5,472/year</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cal Grant B</td>
<td>Maximum: $1,473 for year one</td>
<td>1. Meet criteria 1-6 (from Cal Grant A)&lt;br&gt;2. Meet the 2.0 high school GPA requirement</td>
<td>Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2&lt;sup&gt;nd&lt;/sup&gt;</td>
</tr>
<tr>
<td></td>
<td>Tuition/fee award in the same amount as Cal Grant A after year one.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cal Grant C</td>
<td>Maximum: $547 for books, tools, or equipment at an occupational or career technical school</td>
<td>1. Meet criteria 1-4 (from Cal Grant A)&lt;br&gt;2. For students attending technical or career schools (AA and Certificate programs only)</td>
<td>Submit FAFSA (Dream Application for AB540 students) and Cal Grant C Supplement Form</td>
</tr>
<tr>
<td></td>
<td>Maximum: $2,462 for tuition</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Purpose

Students will understand basic information about the FAFSA/California Dream Act Application as key materials needed in the Cal Grant application process.

### Suggested Grade Level:

12

### Materials and Handouts

- Cal Grants Overview
- Financial Aid App Comparison Table
- FAFSA Overview

### Approximate Time Needed:

25 minutes

### Student-Facing Instructions

Each small group will be assigned to research either the FAFSA or California Dream Act Application. Answer the questions in the table below as it relates to your application. Utilize the corresponding overview handouts that follow as well as any knowledge you or your group members have. As the other groups present, jot down notes in the appropriate column.

### Teacher Notes

This lesson is California-specific. It is 2nd in a 2-lesson series called Cal Grants and Dream Act/FAFSA. Check links as this information is updated yearly.

**BREAKOUT 2: FAFSA/DREAM APPLICATION PRESENTATION PREP (10 minutes)**

**MATERIALS NEEDED:** Chart paper, markers

**TRAINER:** Re-clarify with students what they need to submit in order to apply for the Cal Grant. They must submit the following materials:
Teacher Resource


2. Verified Cal Grant GPA by the deadline (check with your school to learn how they do this)

Provide directions for “Breakout 2.” Each group will be assigned to research either the FAFSA or California Dream Act Application. Groups have 8 minutes to prepare a 1 minute presentation focusing on key information about that particular application. Students will use the “FAFSA: Overview” and “FAFSA: Getting Ready” handouts if presenting on the FAFSA. Students presenting the California Dream Act Application will use the corresponding overview document in their handouts. Students should log their responses (1) on the “Financial Aid Application Comparison Table” handout and (2) on the provided chart paper which will be a visual aid for the presentation. While each group presents, the rest of the class will take notes on the “Financial Aid Application Comparison Table.”

Assign each small group to present on either the FAFSA or Dream Application. Topic assignment should correspond to which application the students in that group will be completing (i.e. AB540 students should not be presenting the FAFSA).

MENTOR: Work with your small group to help students put together their presentations and address any immediate questions. An answer key for the “Financial Aid Application Comparison Table” is provided on page 9. Ensure that each group member is contributing to the discussion and ask clarifying questions where needed. Be sure that students have logged their responses and prepared their chart paper before the time is up.

TRAINER: Prove a two minute time check before calling the class together.

FAFSA/DREAM APPLICATION PRESENTATIONS (15 minutes)

TRAINER: Two groups – whichever you choose – will do a full presentation to the rest of the class. One group will be selected to present the FAFSA while the second group will present the Dream Application. The remaining small groups will add any important information that wasn’t covered. To ensure that each group gets to contribute to the discussion, be strict on time. Remember to engage the Mentors and call on them to provide real life examples.

Call one of the “FAFSA” teams to the front of the room. They have 1 minute to share the key characteristics of this application. If there are additional “FAFSA” teams, have them chime in after the first group wraps up to present any information that differed. If the following specifics were missed, address these quick facts with the class:

- Used to apply for federal and most state financial aid programs
- The applicant must be a U.S. citizen, U.S. national, or eligible non-citizen. Information reported on the FAFSA is submitted directly to the federal government. For this reason, students who are undocumented should not apply.
- FAFSA is free to complete

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Teacher Resource

- Priority deadline for completion is March 2nd

Call a “California Dream Act Application” team to present. Quick facts:

- By applying, AB540 students may qualify for lower fees at California post-secondary institutions and state aid including Cal Grants.
- Complete a California Dream Act Application if you are a non-resident/undocumented student who (1) attended a California high school for over three years, will be graduating with a California high school diploma or equivalent, and have financial need. Additional criteria apply – see handout for more details.
- The application is free to complete
- The website is https://dream.csac.ca.gov/
- Priority deadline for completion is March 2nd

MENTOR: While the presentations are happening, support the Trainer in making sure that students are completing their “Financial Aid Application Comparison Table” handout. Share any real life examples as it relates to applying for financial aid.

After the presentations conclude, spend any remaining time reviewing the “Tips for Applying for a Cal Grant” handout with your small group.
## FINANCIAL AID APPLICATION COMPARISON TABLE

### Answer Key

**Directions:** Each small group will be assigned to research either the FAFSA or California Dream Act Application. Answer the questions in the table below as it relates to your application. Utilize the corresponding overview handouts that follow as well as any knowledge you or your group members have. As the other groups present, jot down notes in the appropriate column.

<table>
<thead>
<tr>
<th></th>
<th>FAFSA</th>
<th>California Dream Act Application</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Why is this application important?</strong></td>
<td>The FAFSA is used to apply for federal and most state financial aid programs including grants, work study, and loans. The FAFSA is also used to determine a student’s eligibility for institutional aid from the college.</td>
<td>By completing the Dream Application, AB540 students may qualify for lower fees at public California colleges and universities and may also qualify for state aid such as Cal Grants, University of California or State University grants, and Board of Governor’s fee waivers.</td>
</tr>
</tbody>
</table>
| **What are the general eligibility requirements?** | Submit a FAFSA if you:  
- are a U.S. citizen, U.S. national, or eligible non-citizen,  
- are attending a participating college or school,  
- are pursuing a degree or certificate in an eligible program and making academic progress,  
- and have financial need – be safe and apply for FAFSA as you may qualify for federal programs | Complete a California Dream Act Application if you are a non-resident or undocumented student who:  
- Attended a California high school for 3+ years  
- Is or will be graduating from a California high school or equivalent  
- Plans to enroll in a qualifying institution of higher education in California  
- Plans to file an affidavit with the institution stating that he/she has filed an application to legalize his/her status or will file as soon as he/she is eligible  
- Demonstrates financial need |
| **How much it cost to file this application?** | Free | Free |
| **Where do I find the application?** | Completing the application is the best option: [www.fafsa.ed.gov](http://www.fafsa.ed.gov) | Completing the application is the best option: [https://dream.csac.ca.gov/](https://dream.csac.ca.gov/) |
| **When should I complete and submit my application by?** | March 2\textsuperscript{nd} – to increase your chances of getting federal and state aid including Cal Grants | March 2\textsuperscript{nd} – to increase your chances of getting aid including Cal Grants |
| **Can you complete this application and the FAFSA/California Dream Act Application?** | No | No |

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Instructions

Each small group will be assigned to research either the FAFSA or California Dream Act Application. Answer the questions in the table below as it relates to your application. Utilize the corresponding overview handouts that follow as well as any knowledge you or your group members have. As the other groups present, jot down notes in the appropriate column.
FINANCIAL AID APPLICATION COMPARISON TABLE

**Directions:** Each small group will be assigned to research either the FAFSA or California Dream Act Application. Answer the questions in the table below as it relates to your application. Utilize the corresponding overview handouts that follow as well as any knowledge you or your group members have. As the other groups present, jot down notes in the appropriate column.

<table>
<thead>
<tr>
<th>Question</th>
<th>FAFSA</th>
<th>California Dream Act Application</th>
</tr>
</thead>
<tbody>
<tr>
<td>Why is this application important?</td>
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<td></td>
</tr>
<tr>
<td>What are the general eligibility requirements?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>How much it cost to file this application?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Where do I find the application?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>When should I complete and submit my application by?</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Can you complete this application and the FAFSA/California Dream Act Application?</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# CAL GRANTS OVERVIEW

Source: [www.calgrants.org](http://www.calgrants.org) and [www.csac.ca.gov](http://www.csac.ca.gov)

| What is a Cal Grant? | A Cal Grant is a type of financial aid that does not need to be repaid. Funded by the California government, Cal Grants are available to graduating high school seniors or recent graduates who meet the eligibility and application requirements and plan to attend a qualifying California university, college, or vocational program. For more details on Cal Grants, visit [www.calgrants.org](http://www.calgrants.org). |
| What are the Eligibility Criteria? | - Apply as a high school senior, within one year of high school graduation, as a community college transfer student and be under 28 years old, or within one year of getting your GED  
- Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria (see below)  
- Be a California resident when you graduated from high school or meet AB540 criteria  
- Have a Social Security number or meet AB540 criteria  
- Attend a qualifying California college  
- Be an undergraduate student; be enrolled at least half-time in a program leading to an undergraduate degree or certificate  
- Have financial need based on your college costs and have family income/assets below the established ceilings (For new applicants: [http://www.csac.ca.gov/facts/2014-15_incomeceilings_new_apps_renewing_recips.pdf](http://www.csac.ca.gov/facts/2014-15_incomeceilings_new_apps_renewing_recips.pdf))  
- Meet any minimum GPA requirements  
- Have registered with U.S. Selective Service (most males)  
- Not owe a refund on a state or federal grant or be in default on a student loan |
| How Do I Apply for a Cal Grant? | Submit two materials:  
2. Verified Cal Grant GPA by the deadline (check with your school to learn how they do this) |
| When is the Application Deadline? | You can apply as early as January 1st with a priority deadline of March 2nd. You are encouraged to apply by this date to maximize your award amount – awards become more limited after this date. |

**ABS40 criteria:**
- Attend a California high school for 3+ years  
- Have or be will graduating from a California high school or equivalent  
- Plan to enroll in a qualifying institution of higher education in California  
- In case of a student without lawful immigration status, file an affidavit with the institution stating that he/she has filed an application to legalize his/her status or will file as soon as he/she is eligible  
- Demonstrate financial need
What is the FAFSA?
The Free Application for Federal Student Aid (FAFSA) is a free application used to apply for federal and most state aid programs including grants, work study, and loans. The FAFSA may also be used to determine a student’s eligibility for institutional aid from the college. The FAFSA asks questions about the student/family’s finances as well as the student’s college plans. Once the student submits their FAFSA, the information is shared with each college the student is interested in. The school then generates a financial aid award package based on the student’s financial need.

Who should submit the FAFSA?
Submit a FAFSA if you:
- are a U.S. citizen, U.S. national, or eligible non-citizen,
- are attending a participating college or school,
- are pursuing a degree or certificate in an eligible program and making academic progress,
- and have financial need – be safe and apply for FAFSA as you may qualify for federal programs

NOTE: If you are an undocumented student, do not complete the FAFSA online as this information is reported directly to the federal government.

How do I apply for the FAFSA?
Submit your FAFSA online at www.fafsa.ed.gov. If you include all required information and signatures, your FAFSA can be processed in as few as three days.

When is the FAFSA due?
Submit the 2015-16 FAFSA as close to January 1st as possible. Check your college websites to see their priority deadline. As a general benchmark, submit your FAFSA by March 2nd if you live in California.
CA Dream Act Application Overview

Purpose
Students will understand basic information about the FAFSA/California Dream Act Application as key materials needed in the Cal Grant application process.

Suggested Grade Level:
12

Materials and Handouts
www.CalDreamAct.org
California Dream Act App Overview
Tips For Applying For A Cal Grant

Approximate Time Needed:
60 minutes

Student-Facing Instructions
Review the informational handout and explore the California Dream Act and facts about the application process as well as the tips for applying for Cal Grants. Remember, Cal Grants are free aid that do not need to be repaid. You will apply by submitting the two documents below by March 2nd to maximize your award amount:

1. Dream Act Application
2. Verified GPA for Cal Grants

To prepare for applying, you will now complete the Worksheet for the California Dream Act Application.

Teacher Notes
This lesson is California-specific. It can stand alone or for more in-depth student understanding, it should follow “Cal Grants and Dream Act/FAFSA Part 2: Financial Aid Comparison Table”. Check links as this information is updated yearly.

Assessment
Completion of Worksheet for California Dream Act Application

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Review the informational handout and explore the California Dream Act and facts about the application process as well as the tips for applying for Cal Grants. Remember, Cal Grants are free aid that do not need to be repaid. You will apply by submitting the two documents below by March 2nd to maximize your award amount:

1. Dream Act Application
2. Verified GPA for Cal Grants

To prepare for applying, you will now complete the Worksheet for the California Dream Act Application.
CA DREAM ACT
Apply by March 2, 2015

Questions about types of CA Dream Act financial aid?
- Wondering if you are a CA Dreamer?
- AB540 eligible?
- Do you need to submit a GPA?

Check out our Dream Act information & resources.

Announcements:
- To apply for a Cal Grant, the 2015-16 Dream Act Application is due by Monday, March 2, 2015.
- Due to scheduled site maintenance, the on-line Dream Act Application will be unavailable every Wednesday and Sunday from 11:30 p.m. to 2:30 a.m. (PST). We apologize for any inconvenience this may cause.

New California Dream Act Application
- Have never filed a California Dream Application
- Want to start a new California Dream Application
- Are ready to get started

Provide a Parent Signature
- Need to request Parent PIN
- Forgot your Parent PIN
- Need to sign your child’s application

California Dream Act Application Login
- Continue or renew your CA Dream Application
- Update or correct current CA Dream Application
- View your Student Aid Report (SAR) and more...

Start Dream
Sign Student
Login To
CALIFORNIA DREAM ACT APPLICATION: OVERVIEW
Source: www.csac.ca.gov

Official Website: https://dream.csac.ca.gov

What is the California Dream Act?
The California Dream Act of 2011 became a law with the passage of Assembly Bill 130 and 131:

- **AB 130**: Allows students meeting AB540 criteria to apply for and receive **private scholarships** administered through public colleges and universities including scholarship funded by private donors, alumni contributions, and individual departmental efforts. Students must contact financial aid office to learn how to apply.
- **AB 131**: Allows students meeting AB540 criteria to apply for and receive **state aid** including institutional grants from the University of California, California State University, and California Community College systems, community college BOG fee waivers, and Cal Grants to use at eligible public and private institutions.

For more information on the California Dream Act, visit: http://www.csac.ca.gov/dream_act.asp

Who should submit a California Dream Act Application?
Complete a California Dream Act Application if you are a non-resident or undocumented student who:

- Attended a California high school for 3+ years
- Is or will be graduating from a California high school or equivalent
- Plans to enroll in a qualifying institution of higher education in California
- Plans to file an affidavit with the institution stating that he/she has filed an application to legalize his/her status or will file as soon as he/she is eligible
- Demonstrates financial need

**NOTE**: Do not complete a California Dream Act Application if you are eligible to apply for the FAFSA.
Where do I complete the California Dream Act Application?
Submit your California Dream Act Application online at https://dream.csac.ca.gov/

When is the California Dream Act Application due?
Submit your application as close to January 1st as possible. As a general benchmark, submit your application by March 2nd to maximize the amount of funding you can receive.

Can I do anything to prepare for the application?
Gather the following documents for yourself and your parent(s) if you are dependent:

- 2014 W-2 forms, tax returns, and any other income records (NOTE: Get your application in early by using the previous year’s information as placeholders. You can come back and update the numbers at a later time.)
- Current bank statements (if applicable)
- Current investment statements (if applicable)
- Current records of child support paid (if applicable)
- Current business and/or farm records (if applicable)

For a list of other Frequently Asked Questions, visit:

For a list of other Frequently Asked Questions, visit:

The California Dream Act Application can only be completed by students who meet the following qualifications:

- Students who cannot file the Free Application for Federal Student Aid (FAFSA), and who also
- Attended at least three full years in a California public or private high school, and who also
- Graduated from a California high school or attained the equivalent prior to the start of the college term, (e.g., a High School Equivalency Certificate from the California GED Office or Certificate of Proficiency resulting from the California High School Proficiency Exam (CHSPE)), and, if applicable, who also
- If they are without lawful immigration status, have or will file an affidavit with the college or university they are attending stating that they have filed an application to legalize their immigration status, or will file an application as soon as they are eligible to do so. This affidavit is filed with the college they attend.

If you meet these requirements, use this worksheet as a guide on how to answer the questions when you fill out the Dream Act Application. The Dream Act Application is online at www.caldreamact.org. The California Student Aid Commission processes the Dream Act Application. Any financial aid received can only be used at eligible California Institutions.

Assembly Bill (AB) 540 was passed in 2001 to allow non-resident students in California to pay resident fees at California’s public colleges and universities. In October 2011, AB 131 was signed into law and allows students eligible for AB 540 to also apply for state financial aid like the University of California Grants, State University Grants and Board of Governors fee waivers, and Cal Grants. Students must verify with their college the financial aid filing requirements at that college.
Remember, Cal Grants are free aid that do not need to be repaid. Apply by submitting the two documents below by March 2nd to maximize your award amount:

1. FAFSA OR Dream Act Application
2. Verified GPA

1. Complete the FAFSA OR Dream Act Application online: Completing the application online saves time and is more convenient for the applicant. The FAFSA can be accessed at [www.fafsa.ed.gov](http://www.fafsa.ed.gov). The Dream Act Application can be found at [https://dream.csac.ca.gov/](https://dream.csac.ca.gov/).

2. File Early: Do your best to submit the FAFSA or Dream Act Application prior to the March 2nd priority deadline in order to maximize your chances of receiving financial aid. Complete a FAFSA on the Web worksheet or Dream Act Application worksheet to speed up application completion time.

3. Enter your name correctly: For FAFSA applicants, be sure your name is entered exactly as it appears on your Social Security card. A mismatch in your name could delay processing time. For those completing the Dream Act Application, be sure your name and other basic information matches what you listed on your college application.

4. Get you GPA verified and submitted: Determine if your high school will submit your verified GPA. If your school does not do this, print out GPA verification form (found at [http://www.csac.ca.gov/doc.asp?id=1177](http://www.csac.ca.gov/doc.asp?id=1177)) that your school can complete and sign. You must then mail in the completed form. This is one half of the Cal Grant application process so do not forget about this step!

5. Enter a current email address: Providing an email address allows for prompt communication regarding your application. Additionally, once the FAFSA/Dream Act Application and verified GPA have been submitted, a California Aid Report (CAR) will be sent via email (this is send via mail if no email is provided). This CAR will indicate the applicant’s Cal Grant eligibility and list the award amounts for the first three California colleges/schools listed on your application.

6. Follow up with your Cal Grant status: Set up a WebGrants 4 Students account ([www.webgrants4students.org](http://www.webgrants4students.org)) to check on the status of your Cal Grant. This account can be accessed at any time. In addition to tracking Cal Grant application status, the site also lists your most recent contact information, allows you to view Cal Grant payment history, allows you to self-certify your high school graduation status, and has links to other financial aid-related websites.

7. Confirm your high school graduation date: Your graduation date must be confirmed in order to start receiving the Cal Grant funds. This can be confirmed as early as June one you have received your diploma or GED. Graduation dates can be confirmed by your high school, college, or the student – the student can complete the verification online (through webgrants4students.org).

If you have any questions, e-mail studentsupport@csac.ca.gov or call 888-CA-GRANT (888-224-7268)
Purpose

The purpose of this lesson is for students to familiarize themselves with the requirements of the Free Application for Federal Student Aid and complete a worksheet in preparation for the application.

Materials and Handouts

- www.fafsa.gov
- FAFSA Getting Ready
- Tips for Applying For A Cal Grant

Student-Facing Instructions

Review the informational handout and explore the FAFSA and facts about the application process as well as the tips for applying for Cal Grants. Remember, Cal Grants are free aid that do not need to be repaid. You will apply by submitting the two documents below by March 2nd to maximize your award amount:

1. FAFSA
2. Verified GPA for Cal Grants

To prepare for applying, you will now complete the FAFSA on the Web Worksheet.

Teacher Notes

Cal Grant references are California-specific and can be omitted for students in other states. Check information and links as the federal government updates this information yearly.

Assessment

Completion of FAFSA-on-the-Web Worksheet
Review the informational handout and explore the FAFSA and facts about the application process as well as the tips for applying for Cal Grants. Remember, Cal Grants are free aid that do not need to be repaid. You will apply by submitting the two documents below by March 2nd to maximize your award amount:

1. FAFSA
2. Verified GPA for Cal Grants

To prepare for applying, you will now complete the FAFSA on the Web Worksheet.
FAFSA: GETTING READY

Plan to submit the FAFSA as close as possible to the January 1st release date to maximize the amount of financial aid received. Prepare for the FAFSA by doing the following:

1. Get a Personal Identification Number (PIN) for yourself and one of your parents (if you are a dependent)

What is a PIN?
A PIN is a four-digit number or six-digit alphabetic code used to access Federal Student Aid websites and electronically sign your FAFSA. You will need to get a PIN for yourself and a separate PIN for one of your parents. A PIN is not required to submit a FAFSA – however, it is the only way to access your information online and is the fastest way to sign your application.

Who is eligible to apply for a PIN?
Anyone with a valid Social Security Number and birth date can apply for a PIN.

How do I apply for a PIN?
a. Go to the FAFSA website and click the “PIN Site” button near the top of the page or go to www.pin.ed.gov
b. Follow the directions to apply for a PIN.
c. The PIN can be emailed or mailed to you. Verify your email and mailing address.
d. Submit the form and wait for the confirmation page. Once the PIN is received, you can electronically sign your FAFSA or make corrections to the application.
2. **Material Collection:** If you are a dependent, you will need the following information for yourself and your parents.

- **Social Security Number (SSN):** You need a SSN to apply for most federal and state aid. If you are a dependent student, you’ll also need your parent’s SSN. **(NOTE: If parents don’t have a SSN, enter all zeros in the appropriate field)**
- **Financial Records:**
  - W-2 forms
  - Current bank statements
  - Investment statements
  - Untaxed income records (veterans benefits, child support, workers compensation)
  - Tax returns **(NOTE: Get your FAFSA in early by using the previous year’s tax information as placeholders. You can come back and update the numbers at a later time. If your estimates are significantly higher or lower than your actual numbers, your EFC may be affected).**
- **Driver’s license number (if applicable)**
- **Alien Registration or Permanent Resident Card (if not a U.S. citizen)**
- **Email address**

3. Complete a **FAFSA on the Web (FOTW) worksheet** to prepare for the FAFSA. Once the 2015-16 FAFSA is released on January 1st, you can quickly copy the information directly into the FAFSA.
TIPS FOR APPLYING FOR A CAL GRANT
Source: http://www.calgrants.org/index.cfm?navId=22

Remember, Cal Grants are free aid that do not need to be repaid. Apply by submitting the two
documents below by March 2nd to maximize your award amount:

1. FAFSA OR Dream Act Application
2. Verified GPA

1. Complete the FAFSA OR Dream Act Application online: Completing the application online saves
time and is more convenient for the applicant. The FAFSA can be accessed at www.fafsa.ed.gov. The
Dream Act Application can be found at https://dream.csac.ca.gov/.

2. File Early: Do your best to submit the FAFSA or Dream Act Application prior to the March 2nd priority
deadline in order to maximize your chances of receiving financial aid. Complete a FAFSA on the Web
worksheet or Dream Act Application worksheet to speed up application completion time.

3. Enter your name correctly: For FAFSA applicants, be sure your name is entered exactly as it appears
on your Social Security card. A mismatch in your name could delay processing time. For those
completing the Dream Act Application, be sure your name and other basic information matches
what you listed on your college application.

4. Get you GPA verified and submitted: Determine if your high school will submit your verified GPA. If
your school does not do this, print out GPA verification form (found at
http://www.csac.ca.gov/doc.asp?id=1177) that your school can complete and sign. You must then
mail in the completed form. This is one half of the Cal Grant application process so do not forget
about this step!

5. Enter a current email address: Providing an email address allows for prompt communication
regarding your application. Additionally, once the FAFSA/Dream Act Application and verified GPA
have been submitted, a California Aid Report (CAR) will be sent via email (this is send via mail if no
email is provided). This CAR will indicate the applicant’s Cal Grant eligibility and list the award
amounts for the first three California colleges/schools listed on your application.

6. Follow up with your Cal Grant status: Set up a WebGrants 4 Students account (www.webgrants4
students.org) to check on the status of your Cal Grant. This account can be accessed at any time. In
addition to tracking Cal Grant application status, the site also lists your most recent contact
information, allows you to view Cal Grant payment history, allows you to self-certify your high
school graduation status, and has links to other financial aid-related websites.

7. Confirm your high school graduation date: Your graduation date must be confirmed in order to
start receiving the Cal Grant funds. This can be confirmed as early as June one you have received
your diploma or GED. Graduation dates can be confirmed by your high school, college, or the
student – the student can complete the verification online (through webgrants4students.org).

If you have any questions, e-mail studentsupport@csac.ca.gov or call 888-CA-GRANT (888-224-7268)
Purpose

Students identify their attitudes and perceptions about loans.

Suggested Grade Level:

12

Materials and Handouts

Loan Reflection

Approximate Time Needed:

10 minutes

Student-Facing Instructions

Complete the handout below individually and share your answers with your small group.

Teacher Notes

This lesson is 1st in a 3-lesson series called Understanding Federal Loans.

BREAKOUT 1: RECAP AND LOAN REFLECTION (10 minutes)

MENTOR:
Do a small group introduction, if appropriate.

MENTOR TIP: Be mindful of student attitudes toward student loans. Students may be fearful or resistant to the idea of taking a loan and may need reassurance that education is a worthwhile investment.

LOAN REFLECTION: Ensure students complete and discuss the “Loan Reflection” handout.

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.

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Assessment

LOAN REFLECTION
(Answer Key)

Directions: Complete the handout below individually and share your answers with your small group.

Have you ever heard the word “loan” before? In what context? What comes to mind when you hear this term?

Students may have heard of loans before but may be resistant or fearful of them. Some words that may come to mind:

- debt
- fear
- stressed
- predatory
- borrow
- bills
- interest
- subsidized/ unsubsidized
- credit

When might someone decide to accept a loan? What should they know or ask before taking a loan?

Loans are usually taken to pay for large purchases such as a home or college education. Before signing any loan paperwork, the borrower should be clear on the principal, interest rate/associated fees, repayment term, and whether the loan is a subsidized or unsubsidized loan (for federal loans).

You may have heard of the term “interest” in the context of a savings account. How is interest related to a loan?

Interest is a small percentage of the principal (initial amount borrowed or invested) that is added on a regular schedule. With a savings account, interest is added to the principal and the account holder acquires that difference in funds. With a loan, interest is also added to the principal. In this case, the borrower needs to pay that additional amount as it is part of the cost of borrowing the funds.

Given what you now know about loans, how would you define it?

A loan is borrowed money that is repaid with interest. Loans should always be accepted last after other forms of financial aid have been explored. Prioritize federal loans over private loans as they offer fixed interest rates and more flexible repayment schedules.

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Instructions

Complete the handout below individually and share your answers with your small group.
LOAN REFLECTION

Directions: Complete the handout below individually and share your answers with your small group.

Have you ever heard the word “loan” before? In what context? What comes to mind when you hear this term?

__________________________________________________________________________

__________________________________________________________________________

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When might someone decide to accept a loan? What should they know or ask before taking a loan?

__________________________________________________________________________

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You may have heard of the term “interest” in the context of a savings account. How is interest related to a loan?

__________________________________________________________________________

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__________________________________________________________________________

Given what you now know about loans, how would you define it?

__________________________________________________________________________

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__________________________________________________________________________
Purpose
Students will come up with a definition for “loan” and understand basic information about the eligibility requirements, application process, and advantages of federal loans (over private loans).

Suggested Grade Level:
12

Materials and Handouts
Federal V Private Loans

Approximate Time Needed:
15 minutes

Student-Facing Instructions
Review the Venn diagram below comparing federal and private loans. Then assess how a federal loan is more preferable to a private loan.

Teacher Notes
This lesson is 2nd in a 3-lesson series called Understanding Federal Loans.

BREAKOUT 2: LOAN BASICS (15 minutes)

TRAINER: Provide directions for “Breakout 2.”
MENTOR: Students have 2-3 minutes to complete and discuss the “Federal vs. Private Loans” handout. An answer key is provided on page 5.

The next section should take approximately 10 minutes to complete. Facilitate a group discussion around questions a potential borrower should ask before accepting a loan. As pre-work for today’s workshop, students were asked to identify three questions. Have each student share 1-2 of their questions, elaborating as needed. For example, if a student says they would ask about the interest rate, have them define “interest rate” and share what sort of rate they would look for. Once everyone has shared, have students review the “Before You Borrow” handout. Discuss and log any questions that were not already mentioned. Be sure to highlight the borrowing tips at the bottom of the handout.

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Teacher Resource

If needed, refer to the “Loan Terminology” handout

TRAINER: Issue a one minute time check. Call the class together and lead a 1 minute debrief.

Assessment

FEDERAL VS. PRIVATE LOANS
(Answer Key)

Directions: Review the Venn diagram below comparing federal and private loans. Then assess how a federal loan is more preferable than a private loan.

FEDERAL LOANS

- Federally funded
- Complete FAFSA to apply
- Financial need is a key eligibility criteria

PRIVATE LOANS

- Money is borrowed and must be repaid with interest
- Must be a U.S. citizen or other eligible resident to qualify
- Can be issued more than one loan at a time

- Privately funded by a bank or other financial institution
- Complete a loan application to apply
- Credit history is a key eligibility criteria

How might a federal loan be more advantageous than a private loan?

1. Interest rates are often lower and at fixed rates
2. More flexible repayment options
3. No credit needed – federal loans are awarded based on financial need
4. Most federal loans have a grace period of six months after graduation
Instructions

Review the Venn diagram below comparing federal and private loans. Then assess how a federal loan is more preferable to a private loan.
FEDERAL VS. PRIVATE LOANS

Directions: Review the Venn diagram below comparing federal and private loans. Then assess how a federal loan is more preferable to a private loan.

FEDERAL LOANS

- Federally funded
- Complete FAFSA to apply
- Financial need is a key eligibility criteria

PRIVATE LOANS

- Money is borrowed and must be repaid with interest
- Must be a U.S. citizen or other eligible resident to qualify
- Can be issued more than one loan at a time

Privately funded by a bank or other financial institution
- Complete a loan application to apply
- Credit history is a key eligibility criteria

How might a federal loan be more advantageous than a private loan?

1. _____________________________________________________________

2. _____________________________________________________________

3. _____________________________________________________________
LOAN TERMINOLOGY

1. **Eligibility Requirements**: Specific criteria that need to be met in order to apply for financial aid (examples: financial need, minimum GPA). Each aid program has their own requirements.

2. **Fixed Interest Rate**: An interest rate that remains constant month-to-month. Interest is a small percentage of the principal (initial amount borrowed or invested) that is added on a regular schedule. With a savings account, interest is added to the principal and the account holder acquires that difference in funds. With a loan, interest is also added to the principal. In this case, the borrower needs to pay that additional amount as it is part of the cost of borrowing the funds.

3. **Federal Loan**: Borrowed money that is repaid with interest. Funding comes from the federal government. Financial need is one of the eligibility requirements.

4. **Grace Period**: An amount of time in which the borrower is not expected to make payments on his/her student loan. With federal student loans, the grace period is generally 6-9 months after graduating or once the student enrolls less than half-time.

5. **Principal**: The total amount of money borrowed not including interest or service charges

6. **Private Loan**: Borrowed money that is repaid with interest. Funding comes from a bank of other private institution and the applicant’ credit history is considered.

7. **Subsidized Loan**: Loans awarded based on financial need; the government pays the interest of the loan during college enrollment and the grace period

8. **Term**: A period of time during which the loan is repaid

9. **Unsubsidized Loan**: Loans are not based on financial need and the borrower is responsible for paying all the interest that accrues on the loan during college and the grace period
Understanding Federal Loans: Evaluating Loan Options

**Purpose**
Students will identify questions to ask before taking out a loan and will compare different loan options and repayment plans including analyzing monthly payment amounts and total interest paid.

**Suggested Grade Level:**
12

**Materials and Handouts**
Before You Borrow
Evaluating Loan Options
Federal Loan Comparison Table
Loan Repayment Table
Loan Terminology

**Approximate Time Needed:**
20 minutes

**Student-Facing Instructions**
Know the following information about borrowing money before taking a loan. Remember to accept loans only after you have accepted free money (e.g. grants, scholarships) and earned money (e.g. work study). Review the Before You Borrow and Loan Terminology handouts as you complete the task.

SCENARIO: You have been offered a $2000 Federal Perkins Loan and a $2000 Parent PLUS Loan. You need to accept one of these two loans in order to attend a state school.

Work with your small group and use the information on the “Federal Loan Comparison Table” and “Loan Repayment Table” to answer the questions on the handout.

**Teacher Notes**
This lesson is 3rd in a 3-lesson series called Understanding Federal Loans.

BREAKOUT 3: EVALUATING LOAN OPTIONS (20 minutes)

TRAINER: Provide directions for “Breakout 3.”

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MENTOR: Students have 10-12 minutes to complete and discuss the “Evaluating Loan Options” handout as a small group. Encourage the group to work together (as a group or in pairs) to navigate the information on the “Loan Comparison Table” and “Loan Repayment Table.” Be patient with those who may not catch on immediately and where possible, have students coach one another to answer the questions.

Spend at least 5 minutes reviewing the answers. An answer key is provided on page 7. If needed, have students explain how they landed on their answer. Use any remaining time to address outstanding questions. If you took out federal loans, share your experience. Some guiding questions to get your started:

- What loans did you take out?
- How much did you borrow? How did you decide on that amount?
- What was/is the repayment process like?
- What tips would you offer?

MENTOR TIP: Be mindful of student attitudes toward student loans. Students may be fearful or resistant to the idea of taking a loan and may need reassurance that education is a worthwhile investment.

TRAINER: Issue a two minute time check. Call the class together and lead a 1-2 minute debrief.

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EVALUATING LOAN OPTIONS
(Answer Key)

SCENARIO: You have been offered a $2000 Federal Perkins Loan and a $2000 Parent PLUS Loan. You need to accept one of these two loans in order to attend UC Berkeley.

Work with your small group and use the information on the “Federal Loan Comparison Table” and “Loan Repayment Table” to answer the questions below:

1. Which loan would you prioritize taking? Why?

Prioritize the Federal Perkins Loan as no interest accrues (essentially the loan is interest free) while the student is enrolled in school. The Perkins Loan also offers a longer grace period in which the student has nine months after graduating before they must begin to pay back the loan. This is designed so that students have time post-graduation to find a job before they start making loan payments.

2. You decide to select a 10-year repayment plan. What would be:

   a. Your total loan payment (principal + interest) $2,545.57
   b. Your monthly payment: $21.21
   c. The total amount of interest you would pay: $545.57

3. If you had decided to select a 25-year repayment plan, what would be:

   a. Your total loan payment (principal + interest) $3,507.54
   b. Your monthly payment: $11.69
   c. The total amount of interest you would pay: $1,507.54

4. How would you reduce the amount of interest you pay for the loan?

To reduce the total amount of interest paid, the borrower should pay off the loan as quickly as possible. Federal loans allow you to pay more than the minimum balance and therefore, the borrower is able to make payments directly towards their principal (the initial amount borrowed). Look at question two – if the student makes a monthly payment of $50, the monthly payment of $21.21 will be deducted and the remaining $28.79 will be put towards the initial $2000 that was borrowed.

5. If you had been offered a Direct Subsidized Stafford Loan for the same amount, would you select the same loan? Why or why not?

Select the Direct Subsidized Stafford Loan as the interest rate is lower (4.66%).

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Instructions

Know the following information about borrowing money before taking a loan. Remember to accept loans only after you have accepted free money (e.g. grants, scholarships) and earned money (e.g. work study). Review the Before You Borrow and Loan Terminology handouts as you complete the task.

SCENARIO: You have been offered a $2000 Federal Perkins Loan and a $2000 Parent PLUS Loan. You need to accept one of these two loans in order to attend a state school.

Work with your small group and use the information on the “Federal Loan Comparison Table” and “Loan Repayment Table” to answer the questions on the handout.

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**BEFORE YOU BORROW**

Know the following information before taking a loan. Remember to accept loans only after you have accepted free money (e.g. grants, scholarships) and earned money (e.g. work study).

<table>
<thead>
<tr>
<th>What is the interest rate? What other fees or costs are associated with the loan?</th>
<th>Loans can have varied interest rates (the percentage of interest changes annually) or fixed (constant) rates. In general, federal loans offer lower, fixed interest rates (i.e. Perkins Loans at 5%) while private loans may be more expensive and varied. Pay attention to other fees associated with the loan (e.g. application fee, early payment penalty fee, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is the loan subsidized or unsubsidized?</td>
<td><strong>Subsidized Loans</strong>: Loans awarded <em>based on financial need</em>; the government pays the interest of the loan during college enrollment and the grace period. <strong>Unsubsidized Loans</strong>: These loans do not consider financial need. The borrower is responsible for paying all interest that is earned on the loan during college and the grace period.</td>
</tr>
<tr>
<td>What are the repayment terms?</td>
<td>Repayment can begin anywhere from during or immediately after college to nine months after graduation. Federal loans often have a 10-25 year repayment period. The <em>amount you pay each month depends on the size of your loan, your repayment term, and interest rate.</em> Consider how much you can afford to pay each month with your expected salary after graduation when the time comes to select a repayment plan.</td>
</tr>
<tr>
<td>How much should you borrow?</td>
<td><em>Borrow only what you need</em> and what you can afford to repay in the future after accepting all other financial aid (grants, scholarships) you qualify for that does not need to be repaid.</td>
</tr>
<tr>
<td>What happens if you are unable to make payments? Are there deferment or forbearance options?</td>
<td>Talk with your lender to understand the repercussions of failing to make loan payments. The borrower is responsible for repaying the full amount of the loan plus interest even if he/she does not complete their college education.</td>
</tr>
</tbody>
</table>

**BORROWING TIPS:**

1. **Subsidized Loans > Unsubsidized Loans**: Always accept subsidized loans before unsubsidized loans so you can avoid paying interest on your loan while in college and during the grace period.
2. **Federal Loans > Private Loans**: Always exhaust federal loans before accepting private loans. Federal loans generally offer lower interest rates and more favorable repayment terms.
3. **Ask Questions**: Talk to your lender if you are unclear about any loan terms and conditions.
EVALUATING LOAN OPTIONS

SCENARIO: You have been offered a $2000 Federal Perkins Loan and a $2000 Parent PLUS Loan. You need to accept one of these two loans in order to attend a state school.

Work with your small group and use the information on the “Federal Loan Comparison Table” and “Loan Repayment Table” to answer the questions below:

1. Which loan would you prioritize taking? Why?

2. You decide to select a 10-year repayment plan. What would be:
   a. Your total loan payment (principal + interest) $ ________________
   b. Your monthly payment: $ ________________
   c. The total amount of interest you would pay: $ ________________

3. If you had decided to select a 25-year repayment plan, what would be:
   a. Your total loan payment (principal + interest) $ ________________
   b. Your monthly payment: $ ________________
   c. The total amount of interest you would pay: $ ________________

4. How would you reduce the amount of interest you pay for the loan?

5. If you had been offered a Direct Subsidized Stafford Loan for the same amount, would you select the same loan? Why or why not?
# Federal Loan Comparison Table

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

<table>
<thead>
<tr>
<th></th>
<th>Federal Perkins Loan (Subsidized)</th>
<th>Direct Subsidized Stafford Loan</th>
<th>Direct Unsubsidized Stafford Loan</th>
<th>Parent PLUS Loan</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Borrower</strong></td>
<td>Student</td>
<td></td>
<td></td>
<td>Parent of dependent undergraduate student</td>
</tr>
</tbody>
</table>
| **Eligibility**      | 1. Meet basic eligibility requirements for federal aid  
2. Demonstrate financial need  
3. Be enrolled at least part-time | 1. Meet basic eligibility requirements for federal aid  
2. Demonstrate financial need  
3. Be enrolled at least half-time | 1. Meet basic eligibility requirements for federal aid  
2. Be enrolled at least half-time | 1. Meet federal aid and credit eligibility requirements  
2. Student must be enrolled at least half-time |
| **Application Process** | Submit FAFSA                      |                                 |                                  | Submit FAFSA; Parents complete a Federal PLUS Loan application |
| **Maximum Loan Amount** | $5,500 (for undergraduates)       | **Dependent Undergraduate:**  
Year One: $5,500 (up to $3,500 subsidized, $2,000 unsubsidized)  
Year Two: $6,500 (up to $4,500 subsidized, $2,000 unsubsidized)  
Year Three and Beyond: $7,500 (up to $5,500 subsidized, $2,000 unsubsidized) | **Independent Undergraduate:**  
Year One: $9,500 (up to $3,500 subsidized, $6,000 unsubsidized)  
Year Two: $10,500 (up to $4,500 subsidized, $6,000 unsubsidized)  
Years Three and up: $12,500 (up to $5,500 subsidized, $7,000 unsubsidized) | Parents can borrow up to the cost of attendance minus any financial aid the student receives |
| **Interest Rate**    | 5%; fixed                         | 4.66%; fixed                   | 4.66%; fixed                     | 7.21%; fixed   |
| **Grace period**     | Nine months after graduation or dropping to less than half-time enrollment | Six months after graduation, leaving school, or enrolling less than half time | Six months after graduation, leaving school, or enrolling less than half time. Interest or loan payments can be made before this time | 60 days after the last loan disbursement; payments can be deferred until six months after graduation or post-enrollment |

### Subsidized Loans
- Loans awarded *based on financial need*; the *government pays the interest* of the loan during college enrollment and the grace period

### Unsubsidized Loans
- *Interest accrues* during college enrollment and the grace period

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### LOAN REPAYMENT TABLE

Source: [www.finaid.org/calculators](http://www.finaid.org/calculators)

<table>
<thead>
<tr>
<th>Amount Borrowed</th>
<th>Loan Term</th>
<th>5% Interest Rate</th>
<th>6% Interest Rate</th>
<th>6.8% Interest Rate</th>
<th>7% Interest Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Monthly Payments</td>
<td>Total Payments</td>
<td>Monthly Payments</td>
<td>Total Payments</td>
<td>Monthly Payments</td>
</tr>
<tr>
<td>$1,000</td>
<td>10</td>
<td>$10.61</td>
<td>$1,272.79</td>
<td>$11.10</td>
<td>$1,332.25</td>
</tr>
<tr>
<td></td>
<td>15</td>
<td>$7.91</td>
<td>$1,423.43</td>
<td>$8.44</td>
<td>$1,518.94</td>
</tr>
<tr>
<td></td>
<td>20</td>
<td>$6.60</td>
<td>$1,583.89</td>
<td>$7.16</td>
<td>$1,719.43</td>
</tr>
<tr>
<td></td>
<td>25</td>
<td>$5.85</td>
<td>$1,753.77</td>
<td>$6.44</td>
<td>$1,932.90</td>
</tr>
<tr>
<td></td>
<td>30</td>
<td>$5.37</td>
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<td>30</td>
<td>$32.21</td>
<td>$11,595.35</td>
<td>$35.97</td>
<td>$12,950.29</td>
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</tbody>
</table>
LOAN TERMINOLOGY

1. **Eligibility Requirements:** Specific criteria that need to be met in order to apply for financial aid (examples: financial need, minimum GPA). Each aid program has their own requirements.

2. **Fixed Interest Rate:** An interest rate that remains constant month-to-month. Interest is a small percentage of the principal (initial amount borrowed or invested) that is added on a regular schedule. With a savings account, interest is added to the principal and the account holder acquires that difference in funds. With a loan, interest is also added to the principal. In this case, the borrower needs to pay that additional amount as it is part of the cost of borrowing the funds.

3. **Federal Loan:** Borrowed money that is repaid with interest. Funding comes from the federal government. Financial need is one of the eligibility requirements.

4. **Grace Period:** An amount of time in which the borrower is not expected to make payments on his/her student loan. With federal student loans, the grace period is generally 6-9 months after graduating or once the student enrolls less than half-time.

5. **Principal:** The total amount of money borrowed not including interest or service charges.

6. **Private Loan:** Borrowed money that is repaid with interest. Funding comes from a bank or other private institution and the applicant’s credit history is considered.

7. **Subsidized Loan:** Loans awarded based on financial need; the government pays the interest of the loan during college enrollment and the grace period.

8. **Term:** A period of time during which the loan is repaid.

9. **Unsubsidized Loan:** Loans are not based on financial need and the borrower is responsible for paying all the interest that accrues on the loan during college and the grace period.
**Guest Speaker:**
**Financial Aid**

### Purpose
This activity allows students to understand what it truly costs to go to college and how to pay for it.

### Suggested Grade Level:
12

### Materials and Handouts
- Speaker Note Taking Form
- Financial Aid Checklist

### Approximate Time Needed:
30 minutes

### Student-Facing Instructions
**Before the Guest Speaker:**
Look through the “Guest Speaker Notetaking Form” that you will use during the guest speaker’s talk.

**After the Guest Speaker:**
Look at the “Financial Aid Checklist” and review your notes that you took when the guest speaker was talking. Discuss your notes with a partner and then with the class item by item. Revise your notes as needed based on the class discussion.

### Teacher Notes
Check for yearly informational updates

### Assessment
Completion of College Information Checklist

---

Adapted from the College Readiness: Financial Aid Guest Speaker Workshop
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Instructions

Before the Guest Speaker:
Look through the “Guest Speaker Notetaking Form” that you will use during the guest speaker’s talk.

After the Guest Speaker:
Look at the “Financial Aid Checklist” and review your notes that you took when the guest speaker was talking. Discuss your notes with a partner and then with the class item by item. Revise your notes as needed based on the class discussion.
Financial Aid Speaker: Note-taking Form

- What is financial aid?

- What is the expected family contribution (EFC)?

- What are the costs of attending college – tuition and fees; books and supplies; room and board (housing and food); personal expenses; and travel and transportation?

- Types of financial aid – needs-based and merit. What’s in a Financial Aid package – grants/scholarships, work-study and loans?
• Deadlines for submission and what happens after you apply – student aid report process; financial aid award packages/appeals

• Applying for outside scholarships

• The College Scholarship Service (CSS) Profile

• The benefits and responsibilities of borrowing for college; ways to reduce how much you borrow; things to know before you borrow – the types of loans you are taking out; interest rates; the total amount you can borrow; approximate payments; how much you will actually get (loan minus fees)
Financial Aid Checklist
This checklist will help you stay on track as you apply for financial aid

Before January 1

Apply for a Federal Student Aid identification (FSA ID) at https://fsaid.ed.gov. Keep your FSA ID in a safe place – you will need it to complete the FAFSA

Research Scholarship opportunities and request application materials

Confirm your citizenship status with US Social Security Administration (800.772.1213 or www.ssa.gov) “What Aid is Limited to Citizens?” “What if I’m not Documented?”

Check with colleges to which you are applying to determine if you need to complete the CS/Financial Aid Profile as well

Start to gather the necessary financial documents and other materials that you and your family will need to complete the FAFSA

In January

Have your parents complete their tax return as soon after January 1st of your senior year as possible

Complete and submit the FAFSA in January

Make corrections, if necessary, to your Student Aid Report (SAR). Correct electronically if you filed FAFSA online

After You Hear From Your Schools

Review and compare financial aid packages offered in the financial aid award letters that are sent to you by colleges that accepted you
Checklist Task:
FAFSA Application: Step-by-Step

Purpose
Students will learn basic information about the FAFSA including key deadlines, materials needed, and the significance of the application in order to understand the financial aid process and steps to secure aid for college.

Suggested Grade Level:
12

Materials and Handouts
FAFSA Application
FAFSA FAQs
Ten Application Tips
2014 15 FAFSA On the Web Worksheet

Approximate Time Needed:
35 minutes

Student-Facing Instructions
Use the “2014-15 FAFSA on the Web Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

The attached FAQ handout answers many of the commonly asked questions regarding the application process. Keep this handout as you continue with the application.

Teacher Notes
Check links, as the federal government updates this information yearly.

RECAP AND INTRO TO FAFSA APPLICATION (15 minutes)
MENTOR:
Do a small group introduction, if appropriate.
FAFSA GROUP - INTRO TO FAFSA: Ensure students complete and discuss the “An Introduction to FAFSA” handout. They will need to review the “FAFSA: Overview” and “FAFSA: Getting Ready” handouts.

Adapted from the GLOW Foundation Financial Literacy curriculum.
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Teacher Resource

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.

APPLICATION QUESTIONS (20 minutes)

TRAINER: Provide directions for “Breakout 2.”

MENTOR: Students have 5-6 minutes to complete and discuss the “FAFSA: The Application” handout. Students will require the “2014-15 FAFSA on the Web Worksheet.” Review the advantages of completing the application online.

Spend the next 10 minutes discussing questions students may have about the application – they may have some based on their pre-work. Use the “FAFSA FAQs” handout as a starting place and focus on the questions that most interest students. Also point students to the “10 FAFSA/California Dream Act Application Tips” handout.

Be sure to emphasize the following points before wrapping up:

Aim to submit your application by March 2nd or earlier depending on what colleges require. Check your schools to inquire about their financial aid policies and deadlines.
Complete the application online (compared to a paper version) to save time.
Undocumented students should not submit the FAFSA online as the information is reported directly to the federal government.
Don’t be afraid to ask for help – see each application’s respective website to get additional assistance.
You must reapply for financial aid for each year you will be enrolled in college, not just your senior year of high school.

TRAINER: Issue a two minute time check. Call the class together and lead a 1-2 minute debrief.

Adapted from the GLOW Foundation Financial Literacy curriculum.
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FAFSA: THE APPLICATION
(Answer Key)

Directions: Use the “2014-15 FAFSA on the Web Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

<table>
<thead>
<tr>
<th>Section Number</th>
<th>Section Focus</th>
<th>Student or Parent Information?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Student: Basic Information</td>
<td>Student</td>
</tr>
<tr>
<td></td>
<td>Questions include name, address, SSN, citizenship, marital status, selective service, drug conviction(s), parent education level, and college information.</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Student: Dependency Status</td>
<td>Student</td>
</tr>
<tr>
<td></td>
<td>Answering “yes” to any of these questions categorizes the student as an “independent.” They are NOT required to provide parent information.</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Parent: Financial Information</td>
<td>Parent – Section is in purple</td>
</tr>
<tr>
<td></td>
<td>Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</td>
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</tr>
<tr>
<td>4</td>
<td>Student: Financial Information</td>
<td>Student</td>
</tr>
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<td></td>
</tr>
</tbody>
</table>

NOTE: This worksheet includes a sampling of the questions on the FAFSA. Completing the application online may allow you to skip some questions based on how your answers to previous questions.

There are two ways to submit the FAFSA – (1) online at www.fafsa.ed.gov or (2) mailing in a paper application. There are many advantages to completing the FAFSA online including:

<table>
<thead>
<tr>
<th>Advantage</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Convenience</td>
<td>The online FAFSA allows students and parents to check on the status of the FAFSA, make corrections, and view information quickly. Additionally, the processing time is faster and built in technology makes the online application more error-proof. Like the paper version, students can begin their application and return to it at a later time.</td>
</tr>
<tr>
<td>IRS Data Retrieval Tool</td>
<td>Students and parents who completed their 2014 taxes can use the IRS Data Retrieval Tool to securely transfer their tax information into the FAFSA. In addition to saving time, this reduces the chances of entering in incorrect information.</td>
</tr>
<tr>
<td>Skip Logic</td>
<td>Certain questions on the FAFSA may be skipped depending on how previous questions were answered. As a result, not every applicant will be asked all of the FAFSA questions resulting in a speedier submission.</td>
</tr>
<tr>
<td>Electronic Signing</td>
<td>Students and parents can use their PIN to sign the FAFSA electronically. A signature page must be signed and mailed if the student chooses to submit a paper FAFSA. This increases processing time.</td>
</tr>
<tr>
<td>Number of Colleges</td>
<td>Students can enter up to ten schools at once compared to four on the paper FAFSA.</td>
</tr>
</tbody>
</table>
Instructions

Use the “2014-15 FAFSA on the Web Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

The attached FAQ handout answers many of the commonly asked questions regarding the application process. Keep this handout as you continue with the application.
**FAFSA: THE APPLICATION**

**Directions:** Use the “2014-15 FAFSA on the Web Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

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**NOTE:** This worksheet includes a sampling of the questions on the FAFSA. Completing the application online may allow you to skip some questions based on how your answers to previous questions.

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</table>
FAFSA FAQS

How long does the FAFSA take to complete?
Block an hour to complete the FAFSA. It will take even less time if a FAFSA worksheet was completed in advance.

Which parent information do I use to complete my FAFSA?
- If the student’s parents are married, use their joint tax return to complete the FAFSA. Only one parent needs to get a PIN.
- If the student’s parents are divorced or separated, list the parent the student lived with for the majority of the time over the past 12 months. If the student lived with both parents for an equal amount of time, list the parent providing the majority of financial support for the past 12 months.
- If the student’s parent is single or widowed, list the information for that parent.
- If the student’s parent remarried, answer the questions about that parent and the step-parent

What if neither of my parents have a Social Security Number (SSN)?
Students who have a SSN are eligible to complete the FAFSA and should not refrain from doing so, even if their parent(s) does not have one. Simply enter in all zeros for the parent field (e.g. 000-00-0000). Do not create a fake SSN.

My family is not contributing to my college education. Can I apply as an “independent”?
Most students will not qualify as an “independent”, even if their parents will not financially support them in college. Talk with the financial aid office for each school being considered – they may be able to adjust the financial aid award letter based on the student’s personal circumstance. Each school will have a different process so speak with them as early as possible.

What if I’m not documented?
Students who do not have a SSN should NOT submit a FAFSA online as this information is reported directly to the federal government. Undocumented students should be prepared to apply for scholarships that do not require a SSN. Some institutions may request that undocumented students complete a paper FAFSA and fax it to them so they can assess the student’s financial need against other students.

Does applying for FAFSA automatically apply me for scholarships?
The FAFSA is used to apply for grants, work study, and loans. There is a separate scholarship application process that varies by organization. Check with the college’s financial aid offices as there may be institutional funding available for eligible students.

Where can I get additional help?
- Talk to the high school college counselor
- For California students: Attend a Cash for College Workshop (www.californiacashforcollege.org)
- Visit the FAFSA website (www.fafsa.ed.gov)
- Contact the U.S. Department of Education at 1-800-433-3243
10 FAFSA/CALIFORNIA DREAM ACT APPLICATION TIPS

Follow these tips to make the most of your time and get your application ready for submission:

1. **Complete the application online:** Completing the FAFSA or Dream Application online saves time and is more convenient for the applicant. There are additional resources and help lines available through the each respective website.

2. **Both applications are FREE:** The first “F” in FAFSA stands for free. Never pay to complete or submit the FAFSA OR Dream Application.

3. **File Early:** The 2015-16 FAFSA and Dream Application becomes available on January 1st, 2015. Submit your application as close to this date as possible in order to maximize your chances of receiving financial aid.

4. **Read Carefully:** Read all directions and questions carefully. Be sure to double check all answers as errors can delay application processing and potentially result in a missed deadline.

5. **(FOR FAFSA) Enter your name as it appears on your Social Security card:** A mismatch in your name could delay processing time.

6. **Save Your Work:** Save your work as you progress through your online application. If you are unable to answer a question, save your progress and return at a later time. Be sure to print a copy of your application for your records as you may want to access this information in future years.

7. **Enter an email address:** Providing an emailing address will allow you to receive an electronic email once your application is submitted.

8. **Create a PIN:** Use your PIN to sign your electronic FAFSA or Dream Application, verify your application status, or make corrections to a processed application. Be sure to save your PIN and your parent’s PIN in a secure place as you will use the same PIN each year you re-apply for aid.

9. **Update the FAFSA/Dream Application with 2014 Tax Information:** A FAFSA can be submitted even if you or your parents have not yet completed their 2014 tax return. Simply use the tax information from the previous year. Remember to return to your application to make the updates and re-submit it. Unlike a college application, either application can be submitted multiple times.

10. **(FOR FAFSA) Use the IRS Data Retrieval Tool:** This Data Retrieval Tool will automatically transfer the student and parent’s tax information in to the FAFSA when granted permission.
The **FAFSA on the Web Worksheet** provides a preview of the questions that you may be asked while completing the Free Application for Federal Student Aid (FAFSA®) online at [www.fafsa.gov](http://www.fafsa.gov).

You must complete and submit a FAFSA to apply for federal student aid and for most state and college aid. Write down notes to help you easily complete your FAFSA anytime after January 1, 2014.

See the table to the right for state deadlines. Your application must be submitted by midnight Central time. Also pay attention to the symbols that may be listed after your state deadline. Check with your high school counselor or your college's financial aid administrator about other deadlines. The Federal deadline is June 30, 2015.

- **This Worksheet is optional and should only be completed if you plan to use FAFSA on the Web.**
- **Sections in purple are for parent information.**
- **This Worksheet does not include all the questions from the FAFSA. The questions that are included are ordered as they appear on FAFSA on the Web. When you are online, you may be able to skip some questions based on your answers to earlier questions.**

**Applying is easier with the IRS Data Retrieval Tool!**
Beginning in early February 2014, students and parents who have completed their 2013 IRS tax return may be able to use FAFSA on the Web to electronically view their tax information. With just a few simple steps, the tax information can also be securely transferred into FAFSA on the Web.

**Sign your FAFSA with a Federal Student Aid PIN!**
If you do not have a PIN, you can apply for one at [www.pin.ed.gov](http://www.pin.ed.gov). Your PIN allows you to electronically sign when you submit your FAFSA. If you are providing parent information, one parent must also sign your FAFSA. To sign electronically, your parent should also apply for a PIN.

**Free help is available!**
You do not have to pay to get help or submit your FAFSA. Submit your FAFSA free online at [www.fafsa.gov](http://www.fafsa.gov). Federal Student Aid provides free help online at [www.fafsa.gov](http://www.fafsa.gov) or you can call 1-800-4-FED-AID (1-800-433-3243). TTY users (hearing impaired) can call 1-800-730-8913.

**NOTES:**
- Additional form may be required.
- # Early priority deadlines may exist for institutional programs.
- * Additional form may be required.
- + Applicants encouraged to obtain proof of mailing.
- * For priority consideration, submit application by date specified.
- ** Federal Student Aid logos and FAFSA are registered trademarks or service marks of Federal Student Aid, U.S. Department of Education.
### SECTION 1 - STUDENT INFORMATION

After you are online, you can add up to ten colleges on your FAFSA. The colleges will receive the information from your processed FAFSA.

<table>
<thead>
<tr>
<th>Student’s Last Name</th>
<th>First Name</th>
<th>Social Security Number</th>
</tr>
</thead>
</table>

#### Student Citizenship Status
(check one of the following)
- U.S. citizen (U.S. national)
- Neither citizen nor eligible noncitizen
- Eligible noncitizen (Enter your Alien Registration Number in the box to the right.)

**Generally, you are an eligible noncitizen if you are:**
- A permanent U.S. resident with a Permanent Resident Card (I-551);
- A conditional permanent resident with a Conditional Green Card (I-551C);
- The holder of an Arrival-Departure Record (I-94) from the Department of Homeland Security showing any of the following designations: “Refugee,” “Asylum Granted,” “Parolee” (I-94 confirms paroled for a minimum of one year and status has not expired), T-Visa holder (T-1, T-2, T-3, etc.) or “Cuban-Haitian Entrant;” or
- The holder of a valid certification or eligibility letter from the Department of Health and Human Services showing a designation of “Victim of human trafficking.”

#### Your Alien Registration Number

| A | A | A | A | A | A | A |

#### Student Marital Status
(check one of the following)
- Single
- Married or remarried
- Separated
- Divorced or widowed

You will be asked to provide information about your spouse if you are married or remarried.

### Selective Service Registration

If you are male and 25 or younger, you can use the FAFSA to register with Selective Service.

### Student Aid Eligibility Drug Convictions

- I have never attended college
- I have never received federal student aid
- I have never had a drug conviction

If you did not check any of these boxes, you will be asked more questions online.

#### What is the highest school parent 1 completed?
- Middle school/Jr. high
- High school
- College or beyond
- Other/unknown

#### What is the highest school parent 2 completed?
- Middle school/Jr. high
- High school
- College or beyond
- Other/unknown

### SECTION 2 - STUDENT DEPENDENCY STATUS

If you can check ANY of the following boxes, you will not have to provide parental information. Skip to page 4.

If you check NONE of the following boxes, you will be asked to provide parental information. Go to the next page.

- I was born before January 1, 1991
- I am married
- I will be working on a master’s or doctorate program (e.g., MA, MBA, MD, JD, PhD, EdD, graduate certificate)

- I am serving on active duty in the U.S. Armed Forces
- I am a veteran of the U.S. Armed Forces
- I now have or will have children for whom I will provide more than half of their support between July 1, 2014 and June 30, 2015

- Since I turned age 13, both of my parents were deceased
- I was in foster care since turning age 13
- I have dependents (other than children or my spouse) who live with me and I provide more than half of their support

- I was a dependent or ward of the court since turning age 13
- I am currently or I was an emancipated minor
- I am currently or I was in legal guardianship
- I am homeless or I am at risk of being homeless

### NOTES:
### SECTION 3 - PARENT INFORMATION

**Who is considered a parent?**  “Parent” refers to a biological or adoptive parent. Grandparents, foster parents, legal guardians, older siblings, and uncles or aunts are **not** considered parents on this form unless they have legally adopted you. If your legal parents are living and married to each other, answer the questions about both of them. If your legal parents are not married and **live together**, answer the questions about both of them. In case of divorce or separation, give information about the parent you lived with most in the last 12 months. If you did not live with one parent more than the other, give information about the parent who provided you the most financial support during the last 12 months or during the most recent year you received support. If your divorced or widowed parent has remarried, also provide information about your stepparent.

**Providing parent 1 information?** You will need:
- Parent 1 (father/mother/stepparent) Social Security Number
- Parent 1 (father/mother/stepparent) name
- Parent 1 (father/mother/stepparent) date of birth
  - Check here if parent 1 is a dislocated worker

**Providing parent 2 information?** You will need:
- Parent 2 (father/mother/stepparent) Social Security Number
- Parent 2 (father/mother/stepparent) name
- Parent 2 (father/mother/stepparent) date of birth
  - Check here if parent 2 is a dislocated worker

**Did you know?**
If your parents file a tax return with the IRS, they may be eligible to use the IRS Data Retrieval Tool, which is the easiest way to provide accurate tax information. With just a few simple steps, they may be able to view their tax return information and securely transfer it into **FAFSA on the Web**.

**Did your parents file or will they file a 2013 income tax return?**
- My parents have already completed a tax return
- My parents will file, but have not yet completed a tax return
- My parents are not going to file an income tax return

**What was your parents’ adjusted gross income for 2013?**
Skip this question if your parents did not file taxes. Adjusted gross income is on IRS Form 1040—Line 37; 1040A—line 21; or 1040EZ—line 4.

$  

**What was your parents’ adjusted gross income for 2013?**

The following questions ask about earnings (wages, salaries, tips, etc.) in 2013. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on the IRS Form 1040—Line 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1.

**How much did parent 1 (father/mother/stepparent) earn from working in 2013?**

$  

**How much did parent 2 (father/mother/stepparent) earn from working in 2013?**

$  

**In 2012 or 2013, did anyone in your parents’ household receive:** (Check all that apply.)
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Supplemental Nutrition Assistance Program (SNAP)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- Free or Reduced Price School Lunch

**Note:** TANF may have a different name in your parents’ state. Call 1-800-4-FED-AID to find out the name of the state’s program.

**Did your parents have any of the following items in 2013?**
Check all that apply. Once online, you may be asked to report amounts paid or received by your parents.

**Additional Financial Information**
- American Opportunity Tax Credit or Lifetime Learning Tax Credit
- Child support paid
- Taxable earnings from work-study, assistantships or fellowships
- Taxable grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

**Untaxed Income**
- Payments to tax-deferred pension and retirement savings plans
- Child support received
- IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- Tax exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pension distributions
- Housing, food and other living allowances paid to members of the military, clergy and others
- Veterans noneducation benefits
- Other untaxed income not reported, such as workers’ compensation or disability

**Your parents may be asked to provide more information about their assets.**
**Your parents may need to report the net worth of their current businesses and/or investment farms.**

**NOTES:**
SECTION 4 - STUDENT INFORMATION

Did you file or will you file a 2013 income tax return?
- I have already completed my tax return
- I will file, but I have not completed my tax return
- I'm not going to file an income tax return

What was your (and spouse's) adjusted gross income for 2013?
Skip this question if you or your spouse did not file taxes. Adjusted gross income is on IRS Form 1040—Line 37; 1040A—line 21; or 1040EZ—line 4.

How much did you earn from working in 2013?
- Check here if you are a dislocated worker

How much did your spouse earn from working in 2013?
- Check here if your spouse is a dislocated worker

In 2012 or 2013, did anyone in your household receive: (Check all that apply.)
- Supplemental Security Income (SSI)
- Temporary Assistance for Needy Families (TANF)
- Supplemental Nutrition Assistance Program (SNAP)
- Special Supplemental Nutrition Program for Women, Infants, and Children (WIC)
- Free or Reduced Price School Lunch

Note: TANF may have a different name in your state. Call 1-800-4-FED-AID to find out the name of the state's program.

Did you or your spouse have any of the following items in 2013? Check all that apply. You may be asked to report amounts paid or received.

Additional Financial Information
- American Opportunity Tax Credit or Lifetime Learning Tax Credit
- Child support paid
- Taxable earnings from work-study, assistantships or fellowships
- Taxable grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

Untaxed Income
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- Tax exempt interest income
- Untaxed portions of IRA distributions
- Untaxed portions of pension distributions
- Housing, food and other living allowances paid to members of the military, clergy and others
- Veterans noneducation benefits
- Other untaxed income not reported, such as workers’ compensation or disability
- Money received or paid on your behalf

You may be asked to provide more information about your (and your spouse's) assets. You may need to report the net worth of current businesses and/or investment farms.

NOTES:

Do not mail this Worksheet. Go to www.fafsa.gov to complete and submit your application.
For more information on federal student aid, visit StudentAid.gov.
You can also talk with your college's financial aid office about other types of student aid that may be available.
Checklist Task:
CA Dream Act Application: Step-by-Step

Purpose
Students will learn basic information about the California Dream Act Application including key deadlines, materials needed, and the significance of the application in order to understand the financial aid process and steps to secure aid for college.

Suggested Grade Level:
12

Materials and Handouts
Dream Application Info Asked
Ca Dream Act And App FAQS
Ten FAFSA/CA Dream Act App Tips
2014 15 Dream Application Worksheet

Materials and Handouts
Approximate Time Needed:
35 minutes

Student-Facing Instructions
Use the “2014-15 Dream Application Worksheet“ to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

The attached FAQ handout answers many of the commonly asked questions regarding the application process. Keep this handout as you continue with the application.

Teacher Notes
This lesson is California-specific. Check information and links as this is updated yearly.

RECAP AND INTRO TO FAFSA/DREAM APPLICATION (15 minutes)

MENTOR:
Do a small group introduction, if appropriate.
DREAM APPLICATION GROUP - INTRO TO DREAM APPLICATION: Ensure students complete and discuss the “An

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Teacher Resource

Introduction to the California Dream Act Application” handout. They will need to review the “California Dream Act Application: Overview” handout.

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.

APPLICATION QUESTIONS (20 minutes)

MENTOR: Students have 5-6 minutes to complete and discuss the “Dream Application: Information Asked” handout. Students will require the “2014-15 Dream Application Worksheet.” Review the advantages of completing the application online.

Spend the next 10 minutes discussing questions students may have about the application – they may have some based on their pre-work. Use the “FAFSA FAQs” or “California Dream Act and Application FAQs” handout as a starting place and focus on the questions that most interest students. Also point students to the “10 FAFSA/California Dream Act Application Tips” handout.

Be sure to emphasize the following points before wrapping up:

- Aim to submit your application by March 2nd or earlier depending on what colleges require. Check your schools to inquire about their financial aid policies and deadlines.
- Complete the application online (compared to a paper version) to save time.
- Undocumented students should not submit the FAFSA online as the information is reported directly to the federal government.
- Don’t be afraid to ask for help – see each application’s respective website to get additional assistance.
- You must reapply for financial aid for each year you will be enrolled in college, not just your senior year of high school.

TRAINER: Issue a two minute time check. Call the class together and lead a 1-2 minute debrief.

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Assessment
Completion of CA Dream Act Application (Screenshot of submission verification)

DREAM APPLICATION: INFORMATION ASKED
(Answer Key)

Directions: Use the “2014-15 Dream Application Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

<table>
<thead>
<tr>
<th>Section Number</th>
<th>Section Focus</th>
<th>Student or Parent Information?</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td><strong>Student: Basic Information</strong>&lt;br&gt;Questions include name, citizenship status, marital status, gender, and parent education level</td>
<td>Student</td>
</tr>
<tr>
<td>2</td>
<td><strong>Student: Dependency Status</strong>&lt;br&gt;Answering “yes” to any of these questions categorizes the student as an “independent.” They are NOT required to provide parent information.</td>
<td>Student</td>
</tr>
<tr>
<td>3</td>
<td><strong>Parent: Financial Information</strong>&lt;br&gt;Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</td>
<td>Parent</td>
</tr>
<tr>
<td>4</td>
<td><strong>Student: Financial Information</strong>&lt;br&gt;Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</td>
<td>Student</td>
</tr>
</tbody>
</table>

NOTE: This worksheet includes a sampling of the questions on the Dream Application. Completing the application online allows you to skip some questions based on your answers to previous questions.

You are encouraged to submit your Dream Application online (https://dream.csac.ca.gov/). Benefits include:

<table>
<thead>
<tr>
<th>Convenience</th>
<th>Submitting your application online allows you to update and make corrections quickly. Additionally, the processing time is faster and built in technology makes the online application more error-proof.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Skip Logic</td>
<td>Certain questions on the Dream Application may be skipped depending on how previous questions were answered. As a result, not every applicant will be asked all of the questions resulting in a speedier submission.</td>
</tr>
<tr>
<td>Electronic Signing</td>
<td>Students and parents can use a PIN to sign the Dream Application. Alternatively, a signature page can be used in place of a PIN.</td>
</tr>
</tbody>
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Copyright © 2014 GLOW. All Rights Reserved.
Use the “2014-15 Dream Application Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

The attached FAQ handout answers many of the commonly asked questions regarding the application process. Keep this handout as you continue with the application.
DREAM APPLICATION: INFORMATION ASKED

Directions: Use the “2014-15 Dream Application Worksheet” to complete the table below. Review the questions listed in each section and determine the focus of each. Then list whether the section is requesting student or parent information.

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NOTE: This worksheet includes a sampling of the questions on the Dream Application. Completing the application online allows you to skip some questions based on your answers to previous questions.

You are encouraged to submit your Dream Application online (https://dream.csac.ca.gov/). Benefits include:

| Convenience | Submitting your application online allows you to update and make corrections quickly. Additionally, the processing time is faster and built in technology makes the online application more error-proof. |
| Skip Logic  | Certain questions on the Dream Application may be skipped depending on how previous questions were answered. As a result, not every applicant will be asked all of the questions resulting in a speedier submission. |
| Electronic Signing | Students and parents can use a PIN to sign the Dream Application. Alternatively, a signature page can be used in place of a PIN. |
How long does the Dream Act Application take to complete?
Block an hour to complete the Dream Act Application. It will take even less time if the worksheet is completed in advance.

AB540, AB130, and AB131 guarantee confidentiality for the student, but what about my parent’s information?
Students without legal immigration status will be required to fill out the CA Student Aid Commission’s Dream Application in lieu of the Free Application for Federal Student Aid (FAFSA).

- Like all other dependent Cal Grant applicants, Dream Act students will be required to submit parental income and asset information.
- There are no checks and matches between the Dream Act Application and federal databases.
- All information provided by students and parents is protected by the same privacy and information security laws and safeguards as all other Cal Grant applicants.

Which parent information do I use to complete my Dream Act Application?
- If the student’s parents are married, use their joint tax return to complete the application. Only one parent needs a PIN.
- If the student’s parents are divorced or separated, list the parent the student lived with for the majority of the time over the past 12 months. If the student lived with both parents for an equal amount of time, list the parent providing the majority of financial support for the past 12 months.
- If the student’s parent is single or widowed, list the information for that parent.
- If the student’s parent remarried, answer the questions about that parent and the step-parent.

What if neither of my parents have a Social Security Number (SSN)?
If your parent does not have a SSN, enter in all zeros for the parent field (e.g. 000-00-0000). Do not create a fake SSN.

My family is not contributing to my college education. Can I apply as an “independent”?
Most students will not qualify as an “independent”, even if their parents will not financially support them in college. Under the “Dependency Determination” section in the application, there is an option that states: “I am unable to provide parent information.” Selecting this choice will direct you to the “Special Circumstances” page. Additionally, talk with the financial aid office for each school being considered – they may be able to adjust the financial aid award letter based on your personal circumstance. Each school will have a different process so speak with them as early as possible.

For additional information related to the California Dream Act Application, visit:
10 FAFSA/CALIFORNIA DREAM ACT APPLICATION TIPS

Follow these tips to make the most of your time and get your application ready for submission:

1. **Complete the application online:** Completing the FAFSA or Dream Application online saves time and is more convenient for the applicant. There are additional resources and help lines available through the each respective website.

2. **Both applications are FREE:** The first “F” in FAFSA stands for free. Never pay to complete or submit the FAFSA OR Dream Application.

3. **File Early:** The 2015-16 FAFSA and Dream Application becomes available on January 1st, 2015. Submit your application as close to this date as possible in order to maximize your chances of receiving financial aid.

4. **Read Carefully:** Read all directions and questions carefully. Be sure to double check all answers as errors can delay application processing and potentially result in a missed deadline.

5. **(FOR FAFSA) Enter your name as it appears on your Social Security card:** A mismatch in your name could delay processing time.

6. **Save Your Work:** Save your work as you progress through your online application. If you are unable to answer a question, save your progress and return at a later time. Be sure to print a copy of your application for your records as you may want to access this information in future years.

7. **Enter an email address:** Providing an emailing address will allow you to receive an electronic email once your application is submitted.

8. **Create a PIN:** Use your PIN to sign your electronic FAFSA or Dream Application, verify your application status, or make corrections to a processed application. Be sure to save your PIN and your parent’s PIN in a secure place as you will use the same PIN each year you re-apply for aid.

9. **Update the FAFSA/Dream Application with 2014 Tax Information:** A FAFSA can be submitted even if you or your parents have not yet completed their 2014 tax return. Simply use the tax information from the previous year. Remember to return to your application to make the updates and re-submit it. Unlike a college application, the either application can be submitted multiple times.

10. **(FOR FAFSA) Use the IRS Data Retrieval Tool:** This Data Retrieval Tool will automatically transfer the student and parent’s tax information in to the FAFSA when granted permission.
The California Dream Act Application can only be completed by students who meet the following qualifications:

- Students who cannot file the Free Application for Federal Student Aid (FAFSA), and who also
- Attended at least three full years in a California public or private high school, and who also
- Graduated from a California high school or attained the equivalent prior to the start of the college term, (e.g., a High School Equivalency Certificate from the California GED Office or Certificate of Proficiency resulting from the California High School Proficiency Exam (CHSPE)), and, if applicable, who also
- If they are without lawful immigration status, have or will file an affidavit with the college or university they are attending stating that they have filed an application to legalize their immigration status, or will file an application as soon as they are eligible to do so. This affidavit is filed with the college they attend.

If you meet these requirements, use this worksheet as a guide on how to answer the questions when you fill out the Dream Act Application. The Dream Act Application is online at www.caldreamact.org. The California Student Aid Commission processes the Dream Act Application. Any financial aid received can only be used at eligible California institutions.

Assembly Bill (AB) 540 was passed in 2001 to allow non-resident students in California to pay resident fees at California’s public colleges and universities. In October 2011, AB 131 was signed into law and allows students eligible for AB 540 to also apply for state financial aid like the University of California Grants, State University Grants and Board of Governors fee waivers, and Cal Grants. Students must verify with their college the financial aid filing requirements at that college.

The Dream Act Application is not an application for federal financial aid. Students eligible to file the FAFSA must do so online at www.fafsa.gov. Students should not complete both applications.

Applying by the Deadlines
Submit your Dream Act Application as early as possible. For the 2014-15 school year, the State Cal Grant program has a March 2, 2014* filing deadline. A school certified GPA verification form available at www.caldreamact.org is also required for the Cal Grant program. Many colleges and universities also use March 2 as a priority deadline but you must check with your college to determine their application deadlines and filing requirements.

You may also need to complete additional forms. Check with your high school guidance counselor or a financial aid administrator at your college about state and college sources of student aid. If you are filing close to one of these deadlines, we recommend you file online at www.caldreamact.org. This is the fastest and easiest way to apply for aid.

After you complete this worksheet, go online to www.caldreamact.org and complete the Dream Act Application. Do not mail this worksheet. After your application is processed, you will be able to see your responses at www.caldreamact.org. If you would like to make changes to your Dream Act Application, log-in at www.caldreamact.org. *State applications with deadlines that fall on a Saturday, Sunday or holiday will be accepted on the next business day.
### SECTION 1 - STUDENT INFORMATION

Do not mail this worksheet. Use it only to collect information before filing the Dream Act Application online at www.caldreamact.org. You can add up to ten colleges on the online Dream Act Application. The colleges you list will automatically receive the information from your processed Dream Act Application. The Dream Act Application is only for colleges located in California.

**Student’s Last Name**
Your full name (exactly as it appears on school records) If your name has a suffix, such as Jr. or III, include a space between your last name and suffix.

**First Name**

**Middle Initial**

**Your Social Security Number (SSN) or Individual Taxpayer Identification Number (ITIN)**
Enter your SSN if you have one. If you do not have an SSN, enter your ITIN, if you have one. If you have both, enter your SSN. If you have neither, leave blank.

**Alien Registration Number**
(If you have one)

**Student Citizenship Status**
Check one of the following:

- I am a U.S. citizen (U.S. national)
- U.S. Citizens must file the FAFSA
- I am an eligible noncitizen.
- (Read Below)

You are an eligible noncitizen if you are:
1. a permanent U.S. resident with a Permanent Resident Card (I-551)
2. a conditional permanent resident with a Conditional Green Card (I-551C)
3. the holder of an Arrival-Departure Record (I-94) from the Department of Homeland Security showing any one of the following designations: “Refugee,” “Asylum Granted,” “Parolee” (I-94 confirms that you were paroled for a minimum of one year and status has not expired), T-Visa holder (T-1, T-2, T-3, etc.) or “Cuban-Haitian Entrant”
4. the holder of a valid certification or eligibility letter from the Department of Health and Human Services showing a designation of “Victim of Human Trafficking.” You are also considered an eligible noncitizen if you are a person who is considered a Battered Immigrant-qualified Alien. Eligible non-citizens, as described above, should file the federal FAFSA application at www.fafsa.gov.

Holders of “T” Visas must file the FAFSA application. Holders of “U” Visas must file the Dream Act Application.

**Student marital status**
Check one of the following:

- Single
- I am separated
- I am married/remarried
- I am divorced or widowed

Males age 18 to 25 must register with the Selective Service System to receive state financial aid. If you are not registered, visit the Selective Service System at www.sss.gov to find out if you need to register.

**Highest school completed by Parent 1:**
- Middle school/Jr. high
- High school
- College or beyond
- Other/unknown

**Highest school completed by Parent 2:**
- Middle school/Jr. high
- High school
- College or beyond
- Other/unknown

### SECTION 2 DEPENDENCY STATUS

Check any that apply to you.

- I was born before January 1, 1991
- I am married
- In 2014-15, I will be working on a master’s or doctorate program (e.g. MA, MBA, MD, JD, PhD, EdD), graduate certificate

- I am serving on active duty in the U.S. Armed Forces
- I am a veteran of the U.S. Armed Forces
- I have dependents (other than children or my spouse) who live with me and I provide more than half of their support

- Both of my parents are deceased
- I was in foster care at any time since turning age 13
- I have dependents (other than children or my spouse) who live with me and I provide more than half of their support

- I was a dependent or ward of the court at any time since turning age 13
- I am currently or I was an emancipated minor
- I am currently or I was in a legal guardianship
- I am homeless or I am at risk of being homeless

For Help — www.caldreamact.org or 888-224-7268
### Section 3 - PARENT INFORMATION

**Who is considered a parent?** “Parent” refers to a biological or adoptive parent. Grandparents, foster parents, legal guardians, siblings, and uncles or aunts are not considered parents on this form unless they have legally adopted you. In case of divorce or separation, give information about the parent you lived with most in the last 12 months. If you did not live with one parent more than the other, give information about the parent who provided you the most financial support during the last 12 months or during the most recent year you received support. If your divorced or widowed parent has remarried, also provide information about your stepparent.

**Providing your Parent 1 information? You will need:**
- Parent 1’s Social Security Number or Parent 1’s Individual Taxpayer Identification Number (ITIN), if they have one
- Parent 1’s name
- Parent 1’s date of birth

**Providing your Parent 2 information? You will need:**
- Parent 2 Social Security Number or Parent 2’s Individual Taxpayer Identification Number (ITIN), if they have one
- Parent 2’s name
- Parent 2’s date of birth

**Did your parents file or will they file a 2013 income tax return?**
- My parents have already completed a tax return
- My parents will file, but have not yet completed a tax return
- My parents are not going to file an income tax return

**What was your parents’ adjusted gross income for 2013?**
Skip this question if your parents did not file taxes. Adjusted gross income is on IRS Form 1040—Line 37; 1040A—Line 21; or 1040EZ—Line 4.

The following questions ask about earnings (wages, salaries, tips, etc.) in 2013. Answer whether or not a tax return was filed. This information may be on the W-2 forms, or your parents may have to total the wages they have been paid for the year.

**How much did Parent 1 earn from working in 2013?**

**How much did Parent 2 earn from working in 2013?**

**Parents Asset Questions:**
- As of the date you complete the Dream Act Application, what is your parents’ total current balance of cash, savings and checking accounts?
- As of the date you complete the Dream Act Application, what is the net worth of your parents’ investments, including real estate? Don’t include the home in which your parents live. Net worth means current value minus debt owed.
- As of the date you complete the Dream Act Application, what is the net worth of your parents’ current businesses and/or investment farms? Don’t include farms or family businesses with 100 or fewer full-time or full-time equivalent employees.

**In 2012 or 2013, did anyone in your parents’ household receive:** (Check all that apply.)
- Supplemental Security Income (SSI)
- Cal Fresh
- Free or Reduced Price School Lunch

**Note:** Outside of California, Cal Fresh is known as Food Stamps and CalWorks is known as Temporary Assistance for Needy Families (TANF)

**Did your parents have any of the following items in 2013?** Check all that apply.

Once online, you may be asked to report amounts paid or received by your parents.

**Additional Financial Information**
- American Opportunity, Hope or Lifetime Learning tax credits
- Child support paid
- Taxable earnings from work-study, assistantships or fellowships
- Taxable grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

**Untaxed Income**
- Payments to tax-deferred pension and savings plans
- Child support received
- IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- Tax exempt interest income
- Untaxed portions of IRA distributions

- Untaxed portions of pension distributions
- Housing, food and other living allowances paid to members of the military, clergy and others
- Veterans noneducation benefits
- Other untaxed income not reported, such as workers’ compensation or disability
Section 4 - STUDENT INFORMATION

Did you or will you file a 2013 income tax return?
- I have already completed a tax return
  - If you will file a 2013 income tax return, you will need your tax returns and/or W-2 forms to complete the Dream Act Application.
- I will file, but have not yet completed a tax return
- I am not going to file an income tax return
  - If you will not be filing an income tax return, enter your the total wages you have earned from working during 2013.

What was your (and spouse’s) adjusted gross income for 2013?
Skip this question if you or your spouse did not file taxes. Adjusted gross income is on IRS Form 1040—line 37; 1040A—line 21; or 1040EZ—line 4.

The following questions ask about earnings (wages, salaries, tips, etc.) in 2013. Answer the questions whether or not a tax return was filed. This information may be on the W-2 forms, or on the IRS Form 1040—Line 7 + 12 + 18 + Box 14 (Code A) of IRS Schedule K-1 (Form 1065); 1040A—line 7; or 1040EZ—line 1.

How much did you earn from working in 2013?

How much did your spouse earn from working in 2013?

Student Asset Questions:
- As of the date you complete the Dream Application, what is the current total balance of your cash, savings and checking accounts?
- As of the date you complete the Dream Application, what is the net worth of your investments, including real estate? Don’t include the home in which you live. Net worth means current value minus debt owed.
- As of the date you complete the Dream Application, what is the net worth of your current businesses and/or investment farms? Don’t include farms or family businesses with 100 or fewer full-time or full-time equivalent employees.

In 2012 or 2013, did anyone in your household receive: (Check all that apply.)
- Supplemental Security Income (SSI)
- CalFresh
- Free or Reduced Price School Lunch
- CalWorks
- Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

Note: Outside of California, Cal Fresh is known as Food Stamps and CalWorks is known as Temporary Assistance for Needy Families (TANF)

Did you (and/or your spouse) have any of the following items in 2013? Check all that apply.
Once online, you may be asked to report amounts you (and/or your spouse) have paid or received.

Additional Financial Information
- American Opportunity, Hope or Lifetime Learning tax credits
- Child support paid
- Taxable earnings from work-study, assistantships or fellowships
- Taxable grant and scholarship aid reported to the IRS
- Combat pay or special combat pay
- Cooperative education program earnings

Untaxed Income
- Payments to tax-deferred pension and savings plans
- Child support received
- IRA deductions and payments to self-employed SEP, SIMPLE and Keogh
- Tax exempt interest income
- Untaxed portions of IRA distributions

- Untaxed portions of pension distributions
- Housing, food and other living allowances paid to members of the military, clergy and others
- Veterans noneducation benefits
- Other untaxed income not reported, such as workers’ compensation or disability

Complete Dream Act Application instructions are online at www.caldreamact.org.

NOTES:

Do not mail this Worksheet. Go to www.caldreamact.org to complete and submit your application.
You can also talk with your college’s financial aid office about other types of student aid that may be available.
Financial aid determined from the Dream Act Application is only for use at California colleges.

For Help — www.caldreamact.org or 888-224-7268
Interpret and Plan
From Financial Aid
Package/Award
Letter
Interpreting Your Award Letter: What’s a Financial Aid Award Letter?

Purpose

In this lesson, students will understand what an award letter is and information that is commonly listed on one.

Suggested Grade Level:

12

Materials and Handouts

What’s A Financial Aid Award Letter

Approximate Time Needed:

15 minutes

Student-Facing Instructions

Work with your small group to define the term “financial aid award letter.” Then circle the items in the table that are commonly found on an award letter. If needed, refer to one of the sample award letters in the student handouts.

Teacher Notes

This lesson is 1st in a 3-lesson series called Interpreting Your Award Letter.

BREAKOUT 1: RECAP AND AWARD LETTERS (15 minutes)

MENTOR:

Do a small group introduction, if appropriate.

FINANCIAL AID AWARD LETTERS: Ensure students complete and discuss the “What’s a Financial Aid Award Letter?” handout.

Before moving on to the next exercise, reiterate the following facts:

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1. Read the award letter carefully. Understand what is being offered as well as the terms and conditions before accepting any financial aid or making a college selection.
2. Award letters may not necessarily be a physical letter. It is common for colleges to send them via email or require the student to login to their college web portal.
3. Cost of Attendance (COA) commonly includes direct and indirect costs associated with attending college. Verify what these costs are. If colleges omit an expense, the student could be spending a lot more out of their pocket. Additionally, recognize that the COAs commonly posted on college websites are average costs of students who are currently enrolled. Students are strongly urged to tailor these figures so their COA is a true reflection of their personal and financial situation.

TRAINER: Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.
WHAT’S A FINANCIAL AID AWARD LETTER? 
(Answer Key)

Directions: Work with your small group to define the term “financial aid award letter.” Then circle the items in the table that are commonly found on an award letter. If needed, refer to one of the sample award letters in the student handouts.

A financial aid award letter is: A notification from colleges you have been accepted to which outline any financial aid you are eligible to receive and in what amount. Your financial need is calculated by looking at the starting Cost of Attendance (COA) and subtracting your Expected Family Contribution (EFC). Award letters are distributed in a variety of ways – they can be mailed or emailed to you or you may need to log in to your student account to access it. Awards and the amount offered can vary greatly between schools; wait until you have carefully reviewed each award letter before making a decision.

Which of the following items might you see on a financial aid award letter? (Circle all that apply)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Student Name or Student ID number</td>
</tr>
<tr>
<td>2.</td>
<td>Parent PLUS Loan</td>
</tr>
<tr>
<td>3.</td>
<td><strong>Cal Grant A, B, or C</strong></td>
</tr>
<tr>
<td>4.</td>
<td>Hourly wage offered for Federal Work Study</td>
</tr>
<tr>
<td>5.</td>
<td>Award amounts for each type of aid offered</td>
</tr>
<tr>
<td>6.</td>
<td>Federal Perkins Loan</td>
</tr>
<tr>
<td>7.</td>
<td><strong>Federal Stafford Unsubsidized Loan</strong></td>
</tr>
<tr>
<td>8.</td>
<td>Number of hours you will work per week (if you decided to accept work study)</td>
</tr>
<tr>
<td>9.</td>
<td><strong>The total amount of aid offered by term</strong> (semester or quarter)</td>
</tr>
<tr>
<td>10.</td>
<td>Outside scholarships you have received</td>
</tr>
<tr>
<td>11.</td>
<td>Cost of Attendance (COA)</td>
</tr>
<tr>
<td>12.</td>
<td>Intended area of study/Major</td>
</tr>
<tr>
<td>13.</td>
<td><strong>Federal Pell Grant</strong></td>
</tr>
<tr>
<td>14.</td>
<td>The total amount of aid offered for the academic year</td>
</tr>
<tr>
<td>15.</td>
<td>Outside scholarships you have applied to (independent scholarships not offered to you from the school)</td>
</tr>
<tr>
<td>16.</td>
<td>Federal Stafford Subsidized Loan</td>
</tr>
<tr>
<td>17.</td>
<td><strong>Federal Work Study</strong></td>
</tr>
<tr>
<td>18.</td>
<td>A section where you can decline the award</td>
</tr>
<tr>
<td>19.</td>
<td><strong>Unmet Need (The difference between your financial need and COA)</strong></td>
</tr>
<tr>
<td>20.</td>
<td>The total award offer for all four years of college</td>
</tr>
<tr>
<td>21.</td>
<td><strong>Expected Financial Contribution (EFC)</strong></td>
</tr>
<tr>
<td>22.</td>
<td>Your Financial Need: COA - EFC</td>
</tr>
<tr>
<td>23.</td>
<td>University or Institutional Grants</td>
</tr>
<tr>
<td>24.</td>
<td>Estimated monthly payment for each loan offered</td>
</tr>
</tbody>
</table>

Note: Once you report any outside scholarships you have received to your college, you will likely receive an updated financial aid award letter. Talk with your financial aid office to learn more.

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Instructions

Work with your small group to define the term “financial aid award letter.” Then circle the items in the table that are commonly found on an award letter. If needed, refer to one of the sample award letters in the student handouts.
WHAT’S A FINANCIAL AID AWARD LETTER?

Directions: Work with your small group to define the term “financial aid award letter.” Then circle the items in the table that are commonly found on an award letter. If needed, refer to one of the sample award letters in the student handouts.

A financial aid award letter is: ______________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

____________________________________________________________________________________

Which of the following items might you see on a financial aid award letter? (Circle all that apply)

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
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<td>Federal Stafford Unsubsidized Loan</td>
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<td>8.</td>
<td>Number of hours you will work per week (if you decided to accept work study)</td>
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<tr>
<td>9.</td>
<td>The total amount of aid offered by term (semester or quarter)</td>
</tr>
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<td>10.</td>
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<td>Intended area of study/Major</td>
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<td>Federal Pell Grant</td>
</tr>
<tr>
<td>14.</td>
<td>The total amount of aid offered for the academic year</td>
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<tr>
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<td>Outside scholarships you have applied to (independent scholarships not offered to you from the school)</td>
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<td>Unmet Need (The difference between your financial need and COA)</td>
</tr>
<tr>
<td>20.</td>
<td>The total award offer for all four years of college</td>
</tr>
<tr>
<td>21.</td>
<td>Expected Financial Contribution (EFC)</td>
</tr>
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<td>22.</td>
<td>Your Financial Need: COA - EFC</td>
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<td>23.</td>
<td>University or Institutional Grants</td>
</tr>
<tr>
<td>24.</td>
<td>Estimated monthly payment for each loan offered</td>
</tr>
</tbody>
</table>

NOTE: Once you report any outside scholarships you have received to your college, you will likely receive an updated financial aid award letter. Talk with your financial aid office to learn more.
Interpreting Your Award Letter Part 2: Analyzing Your Award Letter

Purpose
The purpose of this lesson is for students to review sample award letters from different types of colleges.

Suggested Grade Level:
12

Materials and Handouts
Analyzing Your Award Letter
Navigating The Award Letter Process

Approximate Time Needed:
25 minutes

Student-Facing Instructions
Review the Navigating the Award Letter Process for tips and information to smoothly navigate the award letter process.

Fill out the worksheet using “What’s a Financial Aid Award Letter” handout from Part 1 as a reference.

Teacher Notes
This lesson is 2nd in a 3-lesson series called Interpreting Your Award Letter.

BREAKOUT 2: ANALYZING YOUR AWARD LETTER (25 minutes)

TRAINER: Provide directions for “Breakout 2.”

MENTOR: Students will spend 1 minute reviewing the “Sample Financial Aid Award Letter: CSU Chico” handout. Students have the next 10 minutes to complete and discuss the “Analyzing Your Award Letter” handout using the sample award letter. Assign a different question to each group member and have them

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Teacher Resource

share their responses. Help fill in the blanks for any answers they might have missed.

Students will spend the next 10 minutes reviewing a second award letter and completing the “Comparing Award Letters Side-by-Side” handout. This second letter could be any one of the samples included in the handouts or students could review their own. The answer key provided on page 10 compares CSU Chico to Trinity University, a private college in Texas. Note: The pre-work for this workshop was for students to bring in their own award letter if they received one. Reserve at least 2-3 minutes to review the answers and debrief. Some key takeaways:

1. Many award letters include the same general information, but are formatted in their own way. Students should read these carefully so they don’t overlook any information.
2. From the previous financial aid modules, recall that Free money > Earned money > Borrowed money and Subsidized loans > Unsubsidized loans > Private loans
3. The strongest financial aid award letters offer more gift aid than earned or borrowed aid. Sometimes the school with the highest initial COA becomes the most affordable once financial aid gets factored in.

TRAINER: Issue a two minute time check. Call the class together and lead a 1-2 minute debrief.
ANALYZING YOUR AWARD LETTER (Answer Key)

1. What information is listed on this financial aid award letter? (NOTE: See starting list on “What’s a Financial Aid Award Letter?”)

   CSU Chico - Answers include:
   a. Federal Pell Grant: $5,730 (total)
   b. Federal SEOG: $1,000 (total)
   c. Cal Grant B: $1,648 (total)
   d. State EOP: $1,500 (total)
   e. University Grant: $5,472 (total)
   f. Federal Work Study: $3,500 (total)
   g. Federal Direct Loan – Subsidized: $3,358 (total)
   h. Amount of aid awarded by semester
   i. Amount of aid awarded for the academic year

2. Prioritize the financial aid offered in the award letter from most to least favorable.
   a. Federal Pell Grant (first priority – free money)
   b. Federal SEOG (first priority – free money)
   c. Cal Grant B (first priority – free money)
   d. State EOP (first priority – free money)
   e. University Grant (first priority – free money)
   f. Federal Work Study (second priority – earned money)
   g. Federal Direct Loan (third priority – borrowed money, subsidized)

3. What amount is needed to attend this college assuming the student is living on-campus? $ 206.00

4. What options does the student have to make college more affordable?

   The financial gap is minimal in this example. The student could:
   a. Apply to more outside scholarships
   b. Look at ways he/she can reduce some of the expenses

   If the financial gap were larger, the student should consider the following in addition the ideas above:
   a. Look at other work options – see if the work study amount can be increased or potentially consider another part-time job after reviewing the student’s class schedule
   b. Look at other loan options – potentially consider a parent or private loan
   c. Look at other schools – if the gap is substantial, the student should carefully review the financial aid award letters from other schools to see what is the most affordable

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Instructions

Review the Navigating the Award Letter Process for tips and information to smoothly navigate the award letter process.

Fill out the worksheet using “What’s a Financial Aid Award Letter” handout from Part 1 as a reference.
ANALYZING YOUR AWARD LETTER

1. What information is listed on this financial aid award letter? (NOTE: See starting list on “What’s a Financial Aid Award Letter?”)
   a. ____________________________  e. ____________________________
   b. ____________________________  f. ____________________________
   c. ____________________________  g. ____________________________
   d. ____________________________  h. ____________________________

2. Prioritize the financial aid offered in the award letter from most to least favorable.
   a. ____________________________
   b. ____________________________
   c. ____________________________
   d. ____________________________
   e. ____________________________
   f. ____________________________
   g. ____________________________
   h. ____________________________

3. What amount is needed to attend this college assuming the student is living on-campus?  
   $ ________________

4. What options does the student have to make college more affordable?
   a. ____________________________
   b. ____________________________
   c. ____________________________
NAVIGATING THE AWARD LETTER PROCESS

Directions: Review the following tips and information to smoothly navigate the award letter process.

1. **Sort the Aid Offered**: Read your award letter carefully – the award offering the most funding may NOT be the best package if the majority of it is comprised of loans. Breakdown the amount you are offered in the form gift aid, earned aid, and borrowed aid using the following format:

<table>
<thead>
<tr>
<th>Cost of Attendance (COA):</th>
<th>$</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Free Money Total (e.g. Grants, Scholarships):</td>
<td>$</td>
</tr>
<tr>
<td>B. Earned Money Total (e.g. Federal Work Study):</td>
<td>$</td>
</tr>
<tr>
<td>C. Subsidized Loan Total (e.g. Federal Perkins, Federal Stafford/Direct Loan):</td>
<td>$</td>
</tr>
<tr>
<td>D. Unsubsidized Loan Total (e.g. Federal Stafford/Direct Loan):</td>
<td>$</td>
</tr>
<tr>
<td>E. Parent Loan Total (e.g. Parent PLUS Loan):</td>
<td>$</td>
</tr>
<tr>
<td>Financial Aid Award Letter Total: (Sum A-E)*</td>
<td>$</td>
</tr>
<tr>
<td>Financial Gap/Unmet Need Total (COA-Financial Aid Award Letter Total): (Subtract Financial Aid Award Letter Total from COA)</td>
<td>$</td>
</tr>
</tbody>
</table>

* The financial gap will be larger if you do not accept all forms of aid. How will you reduce this figure?

2. **Award Letters May Change from Year to Year**: You must complete the FAFSA each year to apply for financial aid the following academic year. If your financial situation or funding available to the college changes, your award letter may be impacted. Talk with your college’s financial aid office if you have questions.

3. **Award Letters areFormatted Differently Across Schools**: There is no standard format for an award letter. Even schools within the same system such as the California State University campuses will not have similar looking award letters. Some include your EFC or the cost of attendance. Others breakdown the amount of aid awarded by term or list the annual amount. Read the award letters carefully to make sure you understand all the information.

4. **You Decide What to Accept**: You have the option to accept or deny any aid that is offered – however, bear in mind that once you decline an award, you forfeit that funding and may not be able to get it back later if you need it.

5. **Special Circumstances**: If you have special circumstances related to finances, be sure to contact your financial aid office. Ask them to explain their appeal process so you can try to secure more funding for your education.
Other Questions to Ask (Yourself or the Financial Aid Office):

| General: | 1. What expenses are included in this cost of attendance? Expenses that are not included will increase the cost of attendance.  
2. What deadlines do I need to be aware of? |
| --- | --- |
| Scholarships: | 1. What happens if I receive an outside scholarship (such as from a national or community organization)? How will my financial aid award from the school be affected?  
2. Are the institutional scholarships offered renewable and if so, what are the requirements for maintaining my eligibility? |
| Grants: | 1. Is the funding renewable and if so, what are the requirements for maintaining my eligibility?  
2. If tuition increases, will this aid also increase?  
3. What are the requirements to maintain this aid? Are there enrollment (full time/part-time) or GPA requirements?  
4. How can I maintain the same level of grants after my first year? |
| Work Study: | 1. How many hours per week, month, quarter or semester will I be working?  
2. Do I have this amount of time in my schedule to allocate to a job?  
3. What is the hourly wage?  
4. Can that hourly pay increase with experience?  
5. What types of jobs are available and how do I go about securing one of these positions? |
| Loans: | 1. What is the interest rate? Is it fixed or variable?  
2. What are the terms and conditions of the loan?  
3. Are there other fees associated with the loan?  
4. What might your total loan amount look like in four years (assuming you borrow approximately the same amount each year)?  
5. What would your monthly payments look like? |
| Financial Gap: | 1. What is your remaining out-of-pocket cost (subtract your accepted financial aid total from your cost of attendance)? If you are unwilling to take out loans, do not include that as part of your financial aid total. That is funding you will need to secure elsewhere in order to attend this college.  
2. If your financial aid does not cover the cost of attendance, how will you either reduce your expenses or increase your income?  
   a. Will you need to pull more out of your savings or ask your parents to contribute more?  
   b. Will you need to get a part-time job? Remember, you will be balancing this with school.  
   c. Can you reduce expenses or attend a less expensive college?  
   d. Are you able to borrow more? Before accepting any loan, know the terms and conditions as well as research the repayment options. |

**TIP:** If you have any questions about your financial aid award letter, do not hesitate to contact your financial aid office. Be aware that schools are busy in the spring and it may take a few days for a representative to get back to you. If you would like to be considered for additional financial aid or if the information listed on your FAFSA is not a true reflection of your financial situation, talk to the school about what other aid they can offer you.
# Interpreting Your Award Letter Part 3: Comparing Award Letters

## Purpose
The purpose of this lesson is for students to compare two financial aid award letters and assess which is the better offer and learn tips for navigating the award letter process and key questions to ask before accepting a financial aid award package.

## Suggested Grade Level:
12

## Materials and Handouts
- Sample Award Letter Trinity University
- Sample Award Letter Ucsc
- Sample Award Letter Csu Chico
- Sample Award Letter City College of San Francisco
- Comparing Award Letters Side By Side

## Approximate Time Needed:
5 minutes

## Student-Facing Instructions
Using the sample award letters, fill out the worksheet by comparing the information provided.

## Teacher Notes
This lesson is 3rd in a 3-lesson series called Interpreting Your Award Letter.

**BREAKOUT 3: NAVIGATING THE AWARD LETTER PROCESS (5 minutes)**

**TRAINER:** Provide directions for “Breakout 3.”

**MENTOR:** Spend the remaining 5 minutes discussing the “Navigating the Award Letter Process” handout. Some of these may have already come up in the previous breakouts.

**TRAINER:** Issue a one minute time check. Call the class together and lead a 1-2 minute debrief.

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COMPARING AWARD LETTERS SIDE-BY-SIDE
(Answer Key)

1. **What information is common to both award letters?**
   a. **Federal Pell Grant:** $5,480 (total)
   b. **Federal SEOG:** $2,000 (total)
   c. **University Grant:** $15,085 (total)
   d. **Federal Direct Loan – Subsidized:** $3,500 (total)
   e. **Amount of aid awarded by semester**
   f. **Amount of aid awarded for the academic year**

2. **Prioritize the financial aid offered in the second award letter from most to least favorable.**
   a. **Federal Pell Grant (first priority – free money)**
   b. **Federal SEOG (first priority – free money)**
   c. **Dean’s Scholarship (first priority – free money)**
   d. **University Grant (first priority – free money)**
   e. **Federal Perkins Loan (second priority – borrowed money, subsidized)**
   f. **Federal Direct Subsidized Loan (second priority – borrowed money, subsidized)**
   g. **Federal Direct Unsubsidized Loan (third priority – borrowed money, unsubsidized)**

3. **Compare the aid and amount offered:**

<table>
<thead>
<tr>
<th></th>
<th>School A: CSU Chico</th>
<th>School B: Trinity University</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost of Attendance (COA):</td>
<td>$22,414</td>
<td>$50,550</td>
</tr>
<tr>
<td>Free Money Total (e.g. Grants, Scholarships):</td>
<td>$15,350</td>
<td>$32,565</td>
</tr>
<tr>
<td>Earned Money Total (e.g. Federal Work Study):</td>
<td>$3,500</td>
<td>$0</td>
</tr>
<tr>
<td>Subsidized Loan Total (e.g. Federal Perkins, Federal Stafford/Direct Loan):</td>
<td>$3,358</td>
<td>$7,500</td>
</tr>
<tr>
<td>Unsubsidized Loan Total (e.g. Federal Stafford/Direct Loan):</td>
<td>$0</td>
<td>$2,000</td>
</tr>
<tr>
<td>Parent Loan Total (e.g. Parent PLUS Loan):</td>
<td>$0</td>
<td>$0</td>
</tr>
<tr>
<td>Financial Aid Award Letter Total:</td>
<td>$22,208</td>
<td>$42,065</td>
</tr>
<tr>
<td>Financial Gap/Unmet Need Total (COA-Financial Aid Award Letter Total):</td>
<td>$206</td>
<td>$8,485</td>
</tr>
</tbody>
</table>

4. **Which college offers a better financial aid package?**

   *In this example, CSU Chico is more affordable. While Trinidad University offers more free money and an overall larger financial aid package, the cost of attendance is also significantly higher. The student would also accumulate more debt each year should he/she attend Trinity University.*

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Instructions

Using the sample award letters, fill out the worksheet by comparing the information provided.
COMPARING AWARD LETTERS SIDE-BY-SIDE

1. What information is common to both award letters?
   a. ____________________________________  d. ____________________________________
   b. ____________________________________  e. ____________________________________
   c. ____________________________________  f. ____________________________________

2. Prioritize the financial aid offered in the second award letter from most to least favorable.
   a. ____________________________________
   b. ____________________________________
   c. ____________________________________
   d. ____________________________________
   e. ____________________________________
   f. ____________________________________
   g. ____________________________________

3. Compare the aid and amount offered:

<table>
<thead>
<tr>
<th></th>
<th>School A:</th>
<th>School B:</th>
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</thead>
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<td>Financial Gap/Unmet Need Total (COA-Financial Aid Award Letter Total):</td>
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<td>$</td>
</tr>
</tbody>
</table>

4. Which college offers a better financial aid package? ____________________________________
**SAMPLE FINANCIAL AID AWARD LETTER: TRINITY UNIVERSITY**

Based upon the information provided to the Office of Financial Aid and eligibility criteria for aid programs available at Trinity University, we are able to offer you assistance for the 2014-2015 academic year as shown below. Please read the enclosed guide for detailed information about your funding, including renewal criteria and loan interest rates.

<table>
<thead>
<tr>
<th>AWARD</th>
<th>FALL</th>
<th>SPRING</th>
<th>TOTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>SCHOLARSHIPS/GRANTS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>$2,740.00</td>
<td>$2,740.00</td>
<td>$5,480.00</td>
</tr>
<tr>
<td>Federal SEOG</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$2,000.00</td>
</tr>
<tr>
<td>Dean's Academic Scholarship</td>
<td>$5,000.00</td>
<td>$5,000.00</td>
<td>$10,000.00</td>
</tr>
<tr>
<td>Trinity University Grant</td>
<td>$7,543.00</td>
<td>$7,542.00</td>
<td>$15,085.00</td>
</tr>
<tr>
<td>LOANS</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Perkins Loan</td>
<td>$2,000.00</td>
<td>$2,000.00</td>
<td>$4,000.00</td>
</tr>
<tr>
<td>Federal Direct Subsidized Loan</td>
<td>$1,750.00</td>
<td>$1,750.00</td>
<td>$3,500.00</td>
</tr>
<tr>
<td>Federal Direct Unsubsidized Loan</td>
<td>$1,000.00</td>
<td>$1,000.00</td>
<td>$2,000.00</td>
</tr>
</tbody>
</table>

**AWARD AMOUNT**

- In addition to the assistance referenced above, you are eligible to earn up to $2,400.00 in Federal Work-Study (FWS) for the academic year. In order to receive this funding, you will be required to seek, apply for, and work at a FWS job. FWS earnings are paid bi-weekly for hours worked in the corresponding pay period.

**COST OF ATTENDANCE**

The following estimated budget was used to determine your eligibility for financial aid:

<table>
<thead>
<tr>
<th>Item</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition and Fees</td>
<td>$36,214.00</td>
</tr>
<tr>
<td>Living Allowance</td>
<td>$11,936.00</td>
</tr>
<tr>
<td>Books and Supplies Allowance</td>
<td>$1,000.00</td>
</tr>
<tr>
<td>Personal and Transportation Allowance</td>
<td>$1,400.00</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>$50,550.00</strong></td>
</tr>
</tbody>
</table>
## 2014-15 Undergraduate Budgets - Fall, Winter and Spring Terms

<table>
<thead>
<tr>
<th></th>
<th>On-Campus</th>
<th>Off-Campus</th>
<th>Commuter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total California Resident Budget</td>
<td>$34,356</td>
<td>$30,183</td>
<td>$25,671</td>
</tr>
<tr>
<td>Non-Resident Tuition</td>
<td>$22,878</td>
<td>$22,878</td>
<td>$22,878</td>
</tr>
<tr>
<td>Total Non-California Resident Budget</td>
<td>$57,234</td>
<td>$53,061</td>
<td>$48,549</td>
</tr>
</tbody>
</table>

## Financial Aid Award Summary

**2015**

Financial Aid Summary Link: View your estimated cost of attendance and expected family contribution.

<table>
<thead>
<tr>
<th>Aid Year</th>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>UC Santa Cruz Grant</td>
<td>Grant</td>
<td>20,071.00</td>
<td>0.00</td>
</tr>
<tr>
<td></td>
<td>Non-Resident Exemption</td>
<td>Waiver</td>
<td>22,878.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Aid Year Totals</strong></td>
<td></td>
<td></td>
<td><strong>42,949.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
</tbody>
</table>

### Terms

#### 2014 Fall Quarter

<table>
<thead>
<tr>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Santa Cruz Grant</td>
<td>Grant</td>
<td>6,690.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Non-Resident Exemption</td>
<td>Waiver</td>
<td>7,626.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Term Totals</strong></td>
<td></td>
<td><strong>14,316.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
</tbody>
</table>

#### 2015 Winter Quarter

<table>
<thead>
<tr>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Santa Cruz Grant</td>
<td>Grant</td>
<td>6,690.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Non-Resident Exemption</td>
<td>Waiver</td>
<td>7,626.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Term Totals</strong></td>
<td></td>
<td><strong>14,316.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
</tbody>
</table>

#### 2015 Spring Quarter

<table>
<thead>
<tr>
<th>Award Description</th>
<th>Category</th>
<th>Offered</th>
<th>Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>UC Santa Cruz Grant</td>
<td>Grant</td>
<td>6,691.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Non-Resident Exemption</td>
<td>Waiver</td>
<td>7,626.00</td>
<td>0.00</td>
</tr>
<tr>
<td><strong>Term Totals</strong></td>
<td></td>
<td><strong>14,317.00</strong></td>
<td><strong>0.00</strong></td>
</tr>
</tbody>
</table>
SAMPLE FINANCIAL AID AWARD LETTER: CSU CHICO

In the 2014-15 school year, the cost of attendance (assuming the student lives on-campus), is $22,414.

![Financial Aid Award Summary]

In the 2014-15 school year, the cost of attendance (assuming the student lives on-campus), is $22,414.
**SAMPLE FINANCIAL AID AWARD LETTER: CITY COLLEGE OF SAN FRANCISCO**

<table>
<thead>
<tr>
<th>Need Calculation</th>
<th>Cost of Attendance</th>
<th>Cost of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>$11,901.00</td>
<td>Books &amp; Supplies</td>
</tr>
<tr>
<td>Estimated Family Contribution</td>
<td>$.00</td>
<td>$1,746.00</td>
</tr>
<tr>
<td>Initial Need</td>
<td>$11,901.00</td>
<td>Enrollment and/or Health Fees</td>
</tr>
<tr>
<td>Outside Resource</td>
<td>$1,256.00</td>
<td>$1,290.00</td>
</tr>
<tr>
<td>Need</td>
<td>$10,645.00</td>
<td>Miscellaneous Personal Expense</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Room &amp; Board</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$3,132.00</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Transportation</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,134.00</td>
</tr>
<tr>
<td><strong>Total:</strong></td>
<td></td>
<td>$11,901.00</td>
</tr>
</tbody>
</table>

**Housing Status**
Off Campus

**Expected Enrollment Status**
Full-Time

Financial Aid Award by Term for the Aid Year Jul 2014-Jun 2015

<table>
<thead>
<tr>
<th>Status</th>
<th>Amount Status</th>
<th>Amount Status</th>
<th>Amount Status</th>
<th>Amount Status</th>
<th>Amount Status</th>
<th>Amount Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2014 Credit</td>
<td></td>
<td>Fall 2014 Non-Credit</td>
<td>Spring 2015 Credit</td>
<td>Spring 2015 Noncredit</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fund</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Federal Pell Grant</td>
<td>Accepted</td>
<td>$2,865.00</td>
<td>System Accepted</td>
<td>$2,865.00</td>
<td>System Accepted</td>
<td>$5,730.00</td>
</tr>
<tr>
<td>Federal SEOG</td>
<td>Accepted</td>
<td>$60.00</td>
<td>System Accepted</td>
<td>$60.00</td>
<td>System Accepted</td>
<td>$120.00</td>
</tr>
<tr>
<td>Totals</td>
<td></td>
<td>$2,925.00</td>
<td>$.00</td>
<td>$2,925.00</td>
<td>$.00</td>
<td>$5,850.00</td>
</tr>
</tbody>
</table>
Unit Culminating Task: Award Letter Comparison and Rationale

Purpose
The purpose of this activity is to demonstrate a full understanding of a student’s own award levels and make a decision as to which one to accept.

Suggested Grade Level:
12

Approximate Time Needed:
1-2 class periods

Materials and Handouts
Comparing Your Financial Aid Award Letters

Student-Facing Instructions
Now that you’ve compared sample award letters, you will compare your own financial aid award packages and write a rationale for which college(s) offers you the best package.

In your rationale, be sure to address the following:
1. Which college offers you a better financial aid package? Be sure to think about:
   - Do you want to take a Parent Loan? Unsubsidized Loans?
   - How much time do you want to spend working for your Work Study?
2. Are there travel costs that are not factored in? How much will it cost to fly to a college versus driving to a more local option?
3. Now think about other aspects of these colleges you’ve been accepted to. Which one is your top choice?
   - Are there financial trade-offs for accepting the financial aid offer from your top choice versus your other choices? If so, what are you willing to accept in order to go to your top choice college?
4. Finally, which financial aid award letter do you plan to accept? Why?

Finally, which financial aid award letter do you plan to accept? Why?

Teacher Notes
Unit Culminating Task Prerequisites: Completion of the 3 “Interpreting Your Award Letter” lessons.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Rationale assessed against aligned rubric:

Student Learning Outcomes assessed in this task:
- Develop an argument and draw meaningful connections and conclusions
- Organize and structure argument consistently and logically
- Review prior learning for a broader perspective about educational or life events

Optional Student Learning Outcomes:
- Demonstrates command of standard English conventions
- Skillfully uses written language to convey ideas and understanding

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Now that you’ve compared sample award letters, you will compare your own financial aid award packages and write a rationale for which college(s) offers you the best package.

In your rationale, be sure to address the following:

1. Which college offers you a better financial aid package? Be sure to think about:
   - Do you want to take a Parent Loan? Unsubsidized Loans?
   - How much time do you want to spend working for your Work Study?
2. Are there travel costs that are not factored in? How much will it cost to fly to a college versus driving to a more local option?
3. Now think about other aspects of these colleges you’ve been accepted to. Which one is your top choice?
   - Are there financial trade-offs for accepting the financial aid offer from your top choice versus your other choices? If so, what are you willing to accept in order to go to your top choice college?
4. Finally, which financial aid award letter do you plan to accept? Why?

Finally, which financial aid award letter do you plan to accept? Why?
### Comparing Your Financial Aid Award Letters

| College Name | Cost of Attendance (COA) | A. Free Money Total (e.g. Grants, Scholarships) | B. Earned Money Total (e.g. Federal Work Study) | C. Subsidized Loan Total (e.g. Federal Perkins, Federal Stafford/Direct Loan) | D. Unsubsidized Loan Total (e.g. Federal Stafford/Direct Loan) | E. Parent Loan Total (e.g. Parent PLUS loan) | Financial Aid Award Letter Total (Sum A – E)* | Financial Gap/Unmet Need Total (Subtract Financial Aid Award Letter Total from COA) |
|--------------|--------------------------|-----------------------------------------------|-----------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------|-----------------------------------------------|================================================================================|
|              | $                        | $                                             | $                                             | $                                                                          | $                                                               | $                                             | $                                             | $                                                                 |

* The financial aid gap will be wider if you don't accept all forms of aid. How will you reduce this figure?
Theme: College Application
General Application Information
## Purpose
The purpose of this lesson is to give students information about the different 4-year college applications.

## Suggested Grade Level:
12

## Materials and Handouts
CA College Eligibility Admissions

## Approximate Time Needed:
20 minutes

## Student-Facing Instructions
Take notes as you follow the presentation.

## Teacher Notes
This lesson is California-specific. Follow the powerpoint and its links to inform students about different 4-year college applications. You will need to update any year-specific information.

## Assessment
Completion of notes.

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions
Take notes as you follow the presentation.
California College
Eligibility & Admissions
Important:

*Eligibility* means you’ve met the minimum requirements to apply and be considered. It *does not* guarantee acceptance!
CSU Admissions

- Checklist: a-g approved courses for 9th - 12th grades
- GPA is calculated using 10th & 11th grade weighted grades
- Apply to any CSU via CSU Mentor by November 30
  - GPA
  - Test Scores (SAT or ACT)
CSU Admissions

- 3.0+ GPA = admission to non-impacted campuses & non-impacted majors (with any ACT/SAT score)
- 2.0 - 2.99 GPA = admission to non-impacted campus/major with corresponding SAT or ACT score (see chart)
- Impacted campuses and majors have higher admissions criteria
Local Admission Guarantee

Guarantees a spot if you meet the **deadlines** and **eligibility requirements** for that campus.

- SF State*
- CSU East Bay
- CSU Bakersfield
- CSU Channel Island
- CSU Dominguez Hills
- CSU Maritime Academy
- CSU Stanislaus

This does not, however, guarantee admission to an impacted (overly-filled) major!
Impacted Majors and Campuses

*Impaction* = when the number of applications from eligible students exceeds the number of spaces available in that major or on the whole campus.

Supplementary admission criteria are used to screen all applicants for admission to impacted majors including those students currently enrolled at the campus in other majors and seeking access to the impacted major.
Which CSU Campuses and Majors are Impacted?

CSU Impaction Search

CSU Campus Impaction Chart
What does this mean for me?

- If you have a 3.0 or above in 10th & 11th grades, and you take the SAT or ACT, you will be GUARANTEED a spot at one of the CSU campuses listed on the Local Admission Guarantee slide.
- If you have 2.0 - 2.99 GPA, you will need a specific SAT or ACT score to be eligible to apply to any CSU.
- The higher your GPA and your SAT/ACT score, the more competitive you will be for impacted CSU campuses and majors, as they’ve raised their minimum requirements.
CSU Eligibility Chart for 2.0 - 2.99 GPA

https://secure.csumentor.edu/planning/high_school/cal_residents.asp

Impacted CSU Campuses & Majors: https://www.calstate.edu/sas/documents/impactedprograms/matrix.pdf
Once you have your SAT or ACT scores, we can calculate your eligibility for impacted CSU campuses and majors.

**CSU Eligibility Index Calculator**

<table>
<thead>
<tr>
<th>SAT Scores:</th>
<th>ACT Scores:</th>
</tr>
</thead>
<tbody>
<tr>
<td>(Your GPA) x 800 + Your SAT Total</td>
<td>(Your GPA) x 200 + (10 x ACT Comp)</td>
</tr>
<tr>
<td>&gt;&gt;&gt;&gt; My index is _____</td>
<td>&gt;&gt;&gt;&gt; My index is _____</td>
</tr>
</tbody>
</table>
UC Admissions

- Checklist: a-g approved courses for 9th - 12th grades
- GPA is calculated using 10th & 11th grade weighted grades
- Apply to any UC through UC Admissions by November 30
  - GPA
  - Test Scores (SAT, ACT, Subject Tests)
  - Personal Statement
  - Activities List
UC Admissions

- 3.0+ GPA = *eligible* to apply
- Remember, being eligible does NOT equal admission!

Fall 2014 Freshman Admissions Data
Private College Admissions

- Every private college/university can have different admissions criteria
- Most use the **Common Application** (Common App.)
  - grades (9 - 11 or 10 - 11; weighted or unweighted)
  - test scores (SAT, ACT, Subject Tests)
  - essay
  - activities
  - supplements
  - letters of recommendation
Out-of-State Public College Admissions

- Every out-of-state public college/university can have different admissions criteria
- Some use the Common App
- Others use their own application
  - grades (9 - 11 or 10 - 11; weighted or unweighted)
  - test scores (SAT, ACT, Subject Tests)
  - essay(s)
  - activities
  - supplements
  - letters of recommendation
Quick Facts: % that graduate in 6 years
Applying: % of applicants admitted

What’s Important? 3 Levels: Very Important, Important & Considered
# Deadlines for Private & Out-of-State Colleges

Application deadlines vary greatly for colleges throughout the country. Most are between November 1 and February 1.

<table>
<thead>
<tr>
<th>Early Decision</th>
<th>Early Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Apply early (usually Nov.)</td>
<td>• Apply early (usually Nov. or Dec.)</td>
</tr>
<tr>
<td>• Get an early response</td>
<td>• Get an early response</td>
</tr>
<tr>
<td>• <strong>Binding</strong>: if accepted, you must attend that college. You cannot change your mind.</td>
<td></td>
</tr>
<tr>
<td>• Apply to only 1 college ED; apply to all other colleges regular decision if not accepted</td>
<td>• <strong>Non-Binding</strong>: If accepted, make your decision by May 1</td>
</tr>
</tbody>
</table>
Deadlines for Private & Out-of-State Colleges, continued...

- **Regular Decision:**
  - The college’s regular application deadline

- **Rolling Admissions:**
  - The college accepts students as the applications “roll” in.
  - Applications are accepted as long as spaces are still open.
  - While there may be no specific deadline for applications, there are still deadlines for scholarships, financial aid and housing.
What About Senior Year Grades?

- Usually admissions decisions are based on grades through 11th grade.
  - If you’re on the borderline of being accepted or denied, 1st semester of 12th grade is extremely important.
- Colleges will look for you to maintain or improve your grades during senior year.
  - They will rescind your acceptance if senior year grades drop.
- Mid-Year Report (1st semester of 12th grade)
- Final Transcript (all 4 years of high school)
Managing College Accounts and Test Scores

Purpose

The purpose of this lesson is to help students keep track of college accounts and tests scores.

Suggested Grade Level:
11

Materials and Handouts

College Accounts Organizer (Excel)
College Test Score Keeper (Excel)

Approximate Time Needed:
10 minutes

Student-Facing Instructions

Use the two spreadsheets to keep track of your login information and test scores.

Teacher Notes

Tailor weblinks to your specific school, district, state, etc.

Assessment

Completion of spreadsheets

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Use the two spreadsheets to keep track of your login information and test scores.
<table>
<thead>
<tr>
<th>School/System</th>
<th>Login</th>
<th>Password</th>
<th>Link/URL</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>College Board</td>
<td></td>
<td></td>
<td><a href="http://student.collegeboard.org/">http://student.collegeboard.org/</a></td>
<td>Search for and explore colleges</td>
</tr>
<tr>
<td>California State University</td>
<td></td>
<td></td>
<td><a href="https://secure.csumentor.edu/">https://secure.csumentor.edu/</a></td>
<td>Application for the 23 CSU campuses</td>
</tr>
<tr>
<td>University of California</td>
<td></td>
<td></td>
<td><a href="http://admission.universityofcalifornia.edu/how-to-apply/apply-online/index.html">http://admission.universityofcalifornia.edu/how-to-apply/apply-online/index.html</a></td>
<td>Application for the 9 UC campuses</td>
</tr>
<tr>
<td>Common Application</td>
<td></td>
<td></td>
<td><a href="https://www.commonapp.org/Login">https://www.commonapp.org/Login</a></td>
<td>1 Application for over 500 private College and Universities</td>
</tr>
<tr>
<td>California Colleges</td>
<td></td>
<td></td>
<td><a href="https://secure.californiacolleges.edu/">https://secure.californiacolleges.edu/</a></td>
<td>Resources on colleges in CA</td>
</tr>
<tr>
<td>Exam Date</td>
<td>Critical Reading Score</td>
<td>Math Score</td>
<td>Writing Score</td>
<td>Total</td>
</tr>
<tr>
<td>-----------</td>
<td>------------------------</td>
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<td>0</td>
</tr>
</tbody>
</table>

426
Checklist Task: My Final College List

**Purpose**
The purpose of this lesson is to ensure that students have thought through and documented the colleges they wish to apply to.

**Suggested Grade Level:**
12

**Materials and Handouts**
- My Final College List (Excel)
- Likely Target Reach Definitions

**Approximate Time Needed:**
Varies

**Student-Facing Instructions**
Now that you are a senior, it is time to finalize your college list, so that you can prepare for your upcoming applications. Complete the spreadsheet, My Final College List, and submit it to your teacher for approval.

**Teacher Notes**
The spreadsheet in this lesson contains criteria that you may tailor, depending on your students. It's highly suggested that you keep the “Likely, Target, Reach, etc.” criteria in order to ensure students apply to a variety of colleges - ones that they are likely to get into as well as ones that may be a challenge to get into.

**Checklist Task Prerequisites:** Completion of the “Unit Culminating Task: College Options Written Rationale” from the “Explore College Options” unit.

**Assessment**
Completion of My Final College List spreadsheet.

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Now that you are a senior, it is time to finalize your college list, so that you can prepare for your upcoming applications. Complete the spreadsheet, My Final College List, and submit it to your teacher for approval.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Likely</td>
<td>Your grades and test scores are higher than the average grades and test scores of students admitted at the college.</td>
</tr>
<tr>
<td>Target</td>
<td>Your grades and test scores are about the same as the average admitted at the college.</td>
</tr>
<tr>
<td>Reach</td>
<td>Your grades and test scores are lower than the average admitted at the college. Or the overall chance of admission is around 20-25% at this college.</td>
</tr>
<tr>
<td>Lottery</td>
<td>Any school where the admissions rate is under 20%, even if your test scores and grades are about the same as or above the average range admitted at the college.</td>
</tr>
<tr>
<td>Financial Safety</td>
<td>All students who will need financial aid will need a financial safety on their list. This is a college that you will likely be admitted to and you will likely be able to pay for it.</td>
</tr>
</tbody>
</table>
“My Final College List” excel file should include the following column headers:

<table>
<thead>
<tr>
<th>Rank (your 1st choice, 2nd choice, etc. or doesn’t matter)</th>
<th>College Name</th>
<th>Location</th>
<th>Size</th>
<th>Major</th>
<th>Cost</th>
<th>Acceptance rate</th>
<th>4-year and 6-year graduation rates</th>
<th>Likely, Target, Reach, Lottery, Financial Safety?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brief explanation of why it is a Likely, Target, Reach, Lottery, Financial Safety</td>
<td>What do you like about this college? Describe as much as possible.</td>
<td>What, if any, reservations do you have about this college?</td>
<td>Application Deadline</td>
<td>Application Fee</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Essay Required?</td>
<td>Number of Letters of Rec?</td>
<td>Supplemental documents required?</td>
<td>CSS Profile required?</td>
<td>Institutional scholarships you’re eligible for</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Apply to CSU
Checklist Task: CSU Application

Purpose
The purpose of this activity is to inform students about the steps needed to complete an application to a California State University.

Suggested Grade Level:
12

Materials and Handouts
CSU Application Instructions

Approximate Time Needed:
Varies, depending on number of applications to be completed.

Student-Facing Instructions
Follow this presentation to assist you as you complete the CSU application.

Teacher Notes
This lesson is California-specific. Follow the powerpoint and its links to inform students about the CSU application. You will need to update any year-specific information in the screen-shots (which currently show 2014-2105 as the incoming college freshman class) and your school-specific information, such as graduation date and CEEB code.

Assessment
Completion of CSU application as verified by screenshot of submission page or email of submission confirmation.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Student Resource

**Instructions**

Follow this presentation to assist you as you complete the CSU application.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
CSU Undergraduate Applications

Class of 2015
List of Campuses by Region

1 = Northern California
2 = Central California
3 = Southern California

San Francisco Bay Area
Humboldt
Chico
Sacramento
Stanislaus
Fresno
Fresno
Monterey Bay
San Luis Obispo
Channel Islands
Bakersfield

Greater Los Angeles
Northridge
Los Angeles
San Bernardino
Long Beach
Fullerton

San Marcos
San Diego
Step 1: Click on the Apply tab

Step 2: Click on Undergraduate Admissions Application

There's a video tutorial that takes you through the steps of each section.
Step 3: Be sure to click on Fall 2016.
Applying to Campuses
If you want to refer to written instructions, click here.
Choose a CSU campus and then click “start new application”
A campus-specific page will pop up.

Read this carefully because the information can be different for each campus.

And some campus-specific pages may include additional campus requirements.
To begin the application click on the “Begin Application” button at the bottom of the campus-specific introduction screen.

You must scroll down the screen to view the button.
Remember that each screen has a help video to provide instructions for that page.
Screen 1: Enrollment Information

- Application Information
  - Term Apply for
  - Main campus/Off-campus

- Intended Major
- Degree Objective
- Credential Objective
- Campus Housing

- Entry Status
  - Graduating HS Senior with or without college credit

Depending upon the campus, this question may or may not appear on the application.
Entry Status Options for Applicants

Entry Status
How many total college transferable semester/quarter units will you have completed at time of entry/re-entry into CSU? (Include units in progress and planned.)

- Graduating high school senior with no college credit
- Selected your entry status
- Graduating high school senior with no college credit
- Graduating high school senior with college credit
- Transfer student with fewer than 30 semester/45 unit quarter units
  - 30-59.5 semester units/45-89.5 quarter units
- New 60-89.5 semester units/90-134.5 quarter units
- 90 or more semester units/135 or more quarter units
- Have bachelor's degree or equivalent

Previous Application/A
When did you last apply to CSU?
Term last applied:
• Some of your personal and school information in the following slides will already be pre-populated if you completed the Planner section of CSU Mentor before the application opened on October 1.
• Please be sure to double-check that the information is correct.
Screen 3 – Personal Information

• Applicant Information
  – Social Security Number
  – Confirm SSN
  – If you don’t have a SSN, leave blank.

• Optional Information
  – Misc. Information (NCAA Sports)
  – Parents’ Education*
  – Family Income*
  – Family Size*

* Must include if you’re applying to EOP!
Screen 4 – CA State Residency Information

• Residency Status
  – Your responses to the following questions are required to make a preliminary assessment of your residency status for admission and tuition purposes. The campus may request additional information prior to making a final residence determination.
Screen 6 – High School Information

- **Current or Last High School Attended**
  - High School Information
  - Expected graduation date: 06/2016
  - Other High Schools attended

- **Test Information**
  - Entries for SAT, ACT, EAP scores
You can search by a CEEB code.
**Screen 6 – High School Information (cont.)**

**Test Information**

Enter test score(s) and date(s) taken or will be taken. Please note: CSU campuses will not use the SAT or ACT written scores for 2014-2015 admission decisions.

Transfer applicants: You are not required to complete SAT or ACT information if you will have 60 or more semester units (90 or more quarter units).

<table>
<thead>
<tr>
<th>Date taken/scheduled</th>
<th>English</th>
<th>Math</th>
<th>Reading</th>
<th>Science</th>
<th>Writing</th>
<th>Composite</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2011</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>

**ACT**

<table>
<thead>
<tr>
<th>Date taken/scheduled</th>
<th>English</th>
<th>Math</th>
<th>Reading</th>
<th>Science</th>
<th>Writing</th>
<th>Composite</th>
</tr>
</thead>
<tbody>
<tr>
<td>01/01/2011</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
<td>30</td>
</tr>
</tbody>
</table>

**TOEFL / IELTS / PTE Academic**

TOEFL scores are required of applicants who have not studied full time for at least three years in environments where English is the language of instruction. Some campuses allow students to substitute IELTS or PTE results for the TOEFL.

Please indicate below the scores of the test that you have taken to complete this requirement. Check with the campus to determine the minimum proficiency standards and requirements at that institution.
Screen 8 – High School Preparation 1

Click “Edit” to modify course

Click “Delete” to delete a course

Click “Add...Course” to enter a course
Click “Add a new course”

Your school’s courses will appear – choose which ones you took each school year.

If a class does not appear, enter course in “Other Course” section at the end.
Screen 11 – Educational Opportunity Program (EOP)

11. EDUCATIONAL OPPORTUNITY PROGRAM (EOP)

Are you interested in applying to EOP?
Select Yes or No
(read the instructions section before answering yes)

If you are interested in applying to EOP, you MUST complete the EOP application on paper or online. If you wish to apply online, please visit the Apply Online section of CSUMentor once you submit this application to apply to EOP.
Screen 12 – Application Fee Waiver

- Application Fee Waiver
  - Only complete once
  - Include financial information
  - Calculation of Fee Waiver
  - Now available for students who meet requirements of AB540

- Next Screen:
  - Fee Waiver Granted
  - Fee Waiver Denied
Screen 12 – Application Fee Waiver (Granted)

12. APPLICATION FEE WAIVER

APPLICATION FEE WAIVER PROCESSED

Your application fee waiver request has been processed. You may no longer make any changes to the data that affects your application fee waiver status.

If you have qualified for an application fee waiver, remember that it is a TENTATIVE decision made by this online application. The final decision is still made by the university.

Any questions concerning the fee waiver should be addressed directly to the admission office at the CSU campus.

Date processed: Monday, September 23, 2013 @ 7:55 PM Pacific Time  
Request status: GRANTED

Note: Tentative until final decision made by university, even though ‘Request Status’ is ‘Granted’.
Screen 13 – Review Your Application

**ENROLLMENT INFORMATION**

Term applying for: Fall 2014
Main campus/Off-campus center: Long Beach Campus

Intended major: Business: Marketing BS
   Emphasis/Concentration: 
   Alternate major: 

What is your degree objective? BS

Teacher or other credential program: Not interested in a credential program
Entry status/Total college transferable units: Graduating high school senior with no college credit

When did you last apply to CSU Long Beach? Never applied

**NAME AND ADDRESS**

Legal name: Test, Sharon

Current mailing address: 100 Corporate Pointe, Culver City, CA 90230
Permanent address: 100 Corporate Pointe, Culver City, CA 90230

Primary telephone: (310) 555-5566
Cell phone: 
E-mail address: dontknow@yahoo.com

**PERSONAL INFORMATION**

Review with your advisor or teacher!
Screen 13 – Submit Your Application
(bottom of page)

Click to submit your application!
Payment Options

• Credit Cards
  – Visa
  – MasterCard
• Check / E-Checks or Money Order
• Fee Waiver
  – Option only if granted
  – Apply only once for up to 4 CSU Campuses
  – Applies all academic year
Application Submitted (sample)

CSU LONG BEACH
UNDERGRADUATE APPLICATION AGREEMENT STATEMENT

Your application to CSU Long Beach was already submitted on 9/23/2013 6:06:00 PM for Fall 2014.

Please print this page now (use your browser’s print function). Do not mail it to CSU Long Beach.

If you wish to print out a copy of the information you submitted in this application for your records only, click here.

1. Your application has been submitted to CSU Long Beach.
2. You have been tentatively approved for a fee waiver (final fee waiver determination must be made by the university).
3. You will be sent written notification and additional application information within 30 working days.

Remember to complete the admission requirements as specified in the introduction.

If you would like to apply to another CSU campus, please return to the Application Manager by clicking the link below.

Thank you for your interest in the Educational Opportunity Program! You may now complete the online EOP application for CSU Long Beach (click here to be taken to the EOP Application Manager). You can also return to CSUMonitor at a later time to fill out the EOP application (a link is available in the Apply Online section).

Recent high school graduates: Learn more about preparing for the CSU math and English placement requirements.

<table>
<thead>
<tr>
<th>Applicant name:</th>
<th>Sharon Test</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application:</td>
<td>CSU Long Beach</td>
</tr>
<tr>
<td>Social Security number:</td>
<td>XXXXX-5179 (full number hidden for security purposes)</td>
</tr>
<tr>
<td>Application term:</td>
<td>Fall 2014</td>
</tr>
<tr>
<td>Major:</td>
<td>Business: Marketing BS</td>
</tr>
<tr>
<td>E-mail address:</td>
<td><a href="mailto:dontknow@yahoo.com">dontknow@yahoo.com</a></td>
</tr>
<tr>
<td>Confirmation number:</td>
<td>0008-0F2014-2-09232013-00005205-00221740</td>
</tr>
<tr>
<td>Date submitted:</td>
<td>9/23/2013 6:06:00 PM</td>
</tr>
</tbody>
</table>

NONDICRIMINATION POLICY
Applying to EOP

- Remember, EOP is a SEPARATE application for CSUs!
- You can access the EOP application for a particular CSU campus directly from the application submission confirmation page
Student Support

Phone Calls
1-800-GO-TO-XAP (1-800-468-6927)

E-mail
support@csumentor.edu

Website
www.csumentor.edu

Bilingual Support in Spanish
Monday through Friday 6:30am – 6:30pm

Fileing 6XSSort in 6SanisK

onday tKroXgK )riday     am ± Sm

461
Apply
to EOP
at UCs or CSUs
Checklist Task: EOP Application

**Purpose**

The purpose of this activity is to inform students about the steps needed to complete an Educational Opportunity Program (EOP) application to a California State University or University of California campus.

**Suggested Grade Level:**

12

**Materials and Handouts**

EOP Application Checklist
EOP Application

**Approximate Time Needed:**

Varies

**Student-Facing Instructions**

Follow this presentation to assist you as you complete the EOP application.

**Teacher Notes**

This lesson is California-specific. Follow the powerpoint and its links to inform students about the EOP application. You will need to tailor the letter of recommendation section to your school’s process. You will also need to update any year-specific information.

**Assessment**

Completion of Checklist and EOP application as verified by screenshot of submission page or email of submission confirmation.

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Follow this presentation to assist you as you complete the EOP application.
Educational Opportunity Program - Application Checklist

**EOP at UCs**

Note: EOP is only offered at Berkeley, Davis, Santa Cruz, and Santa Barbara.

There is no separate application for the Educational Opportunity Program at UCs.

_____ When completing the standard UC application, indicate that you would like to apply to EOP when asked.
_____ Respond to the questions asking you to explain why you want to be a part of the program.
_____ Answer the questions about parents’ level of education, family size, and household income.

**EOP at CSUs**

_____ Check to make sure that the campus you are applying to has the EOP program by checking their website.
_____ Complete the regular CSU application. **When asked on the CSU Application if you want to apply for EOP, say that you do. This should be finished by the middle of October at the latest!**
_____ For each CSU campus that you are applying to, complete its EOP application.
_____ Request a letter of recommendation from your mentor
_____ Request a letter of recommendation from your assigned teacher
_____ Draft a response to all five EOP essay questions.
_____ Ask your advisor to proofread your essay responses.
_____ Ask your advisor to check that your application is complete.
_____ Submit your application by the end of October!

**Essay Questions for the Educational Opportunity Program**

Answers to the following questions will determine your motivation and preparation to undertake college work. Please answer as precisely and honestly as possible. Use complete sentences and avoid responses such as “yes” or “no”.

---

465
List any volunteer, extracurricular activities, or work experience in which you are or have been involved in the past two years.

Why would you like to attend college? Discuss your career and personal goals. Are there any particular circumstances, school experiences, or persons that influenced your preparation or motivation to attend college (e.g., cultural/financial background, family, teachers, schools you attended)? Please explain.

Briefly discuss your academic background. Did you utilize any additional support at your high school, such as tutoring? Do your grades in high school and/or college reflect your academic ability or potential?

Briefly describe your family’s economic background. Include information about your financial challenges.

Please tell us more about yourself. Is there any additional information you would like EOP to consider in determining your admission to the program?

Type your responses to these questions in a Word document first, so that:
1) You can get feedback and then revise your responses before submitting them.
2) You can copy and paste your responses into the EOP application for each CSU you’re applying to.
Everything you ever wanted to know about EOP
Objectives

By the end of this time, you will understand

- what Educational Opportunity Program is and how it can benefit you
- how to apply to EOP at CSUs & UCs
- how to request letters of recommendation for EOP at CSU campuses
- the application questions for the CSU EOP and begin drafting your responses to them
Warm-Up

Turn to your partner.

What do you already know about the Educational Opportunity Program at CSUs & UCs?
What is EOP?

- The Educational Opportunity Program is a college support program at most CSUs, designed for low-income, first-generation college students with high potential for success in college.
- Through EOP, students are offered different supports that may include:
  - Orientation
  - Tutoring
  - Advising
  - Grants / Financial Aid
  - Summer Bridge Program
Other Features of EOP

- EOP considers and advocates for CSU admission for students who might not meet regular CSU admissions criteria. For example:
  - A student who does not meet the minimum GPA (2.0) for CSU could be considered for admission to a CSU if they also submit an EOP application.
  - A student who meets the minimum GPA requirement, but does not have a high enough ACT/SAT score for CSU admission could be considered for admission to a CSU if they also submit an EOP application.
How do I apply to EOP at UCs?

There is no separate application for the Educational Opportunity Program at UCs.

- When completing the standard UC application, indicate that you would like to apply to EOP when asked.
- Respond to the questions asking you to explain why you want to be a part of the program.
- Answer the questions about parents’ level of education, family size, and household income.
How do I apply to EOP at CSUs?

- In a group of four, read through the EOP Application checklist.
- What will you need to do to apply to EOP at a CSU?
You need to request TWO letters of recommendation (one from your mentor, one from a teacher) for your CSU EOP recommendation.

What to do:
- Ask your counselor and a teacher if they’ll write an EOP letter of recommendation for you.
- Include a “brag sheet” (extracurriculars and major successes that you would want them to include!)

You need to do this ASAP!
To apply to EOP at CSUs, you need to write five short essays. Your responses need to be

AT LEAST a paragraph long each, and must be written in complete sentences.

Look over the questions right now.

Responses:

To apply to EOP at CSUs, you need to write five short essays. Your responses need to be

AT LEAST a paragraph long each, and must be written in complete sentences.

Look over the questions right now.

Responses:
Apply early!

You need to apply to EOP ASAP! Most CSU campuses have rolling admissions for EOP, which means once they’re full, they’re full.

That also means you need to finish your CSU application as soon as possible.

EOP is highly competitive! You are all competitive candidates, but you need to get started as soon as possible.
Use the checklist to begin your CSU / EOP applications.

1. Complete your CSU application on CSU mentor.
2. Begin drafting your responses to the EOP essay questions.
Apply to UC
Checklist Task: UC Application

Purpose
The purpose of this activity is to inform students about the steps needed to complete an application to a University of California campus.

Suggested Grade Level:
12

Materials and Handouts
UC Application Process 2014

Approximate Time Needed:
Varies

Student-Facing Instructions
Follow the powerpoint instructions for completing your UC application.

Teacher Notes
This lesson is California-specific. Follow the powerpoint and its links to inform students about the UC application. You will need to update any year-specific information in the screen-shots (which currently show 2014-2105 as the incoming college freshman class) and your school-specific information, such as graduation date and CEEB code.

Assessment
Completion of UC application as verified by screenshot of submission page or email of submission confirmation.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Follow the powerpoint instructions for completing your UC application.
UC Applications

- UC applications ARE open. However you cannot submit your application until November 1.

- UC Admissions recommends that you first read through these guidelines before filling out your application:
  
## Freshman Timeline

<table>
<thead>
<tr>
<th>Date</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>August 1</td>
<td>Application opens for fall admission</td>
</tr>
<tr>
<td>November 1 – 30</td>
<td>Submit your UC application</td>
</tr>
<tr>
<td>Early January</td>
<td>Update December test scores</td>
</tr>
<tr>
<td>March 1 – 31</td>
<td>Notification of admission decision</td>
</tr>
<tr>
<td>May 1</td>
<td>Statement of Intent to Register (SIR) deadline</td>
</tr>
<tr>
<td>July 1</td>
<td>Final transcript deadline</td>
</tr>
</tbody>
</table>

Note that the online application system can be slow on or near November 30 because of high user volume, so in order to ensure your application is submitted on time, submit it early!
UC Applications

- Go to: admissions.universityofcalifornia.edu and create an account

The application deadline is approaching.
You have 3 more days to submit your application to meet the Nov-30 deadline.

Sign In
E-mail Address
Password
GO
Forgot your password?

Create a New Account
If you don't have an account you can create one here.
NEW ACCOUNT

ALL first-time applicants start here
UC Applications

- Make sure you apply for Fall Quarter/Semester 2015, as a Freshman.
Navigating

• Use the progress bar above to navigate
• Use sections on the right for guidance
• Use buttons below to move from page to page
• Note my uc application, help, and sign out
Error Messages

Oops! There are errors on the page that need to be corrected.

This will show up at the top if you’ve made a mistake or something is incomplete.
UC Applications

- You’ll go through the steps of the application. Note the Questions? section on the side bar. Refer to them if you need to!
The Basics

Make sure to type your address correctly. Important mail often gets returned to the UC admissions office because students incorrectly typed their address.
More Basics

Your Phone Number

What is your phone number?

- United States  - International

Primary Phone

(925) 566-1234

Phone Type

Cell/Mobile

I authorize text messages to the telephone number above and accept responsibility for any charges incurred.

Alternate Phone

(925) 565-5678

Phone Type

Home/Other

We will use this number only if we are unable to reach you at your primary number.
Residency

California Residency

Have you attended a California high school for three or more years and will graduate or have graduated from a California high school?

- Yes
- No

How long have you lived in California?

- I have lived in California my entire life.
- I have lived in California since I moved here.
- I don't live in California.

When did you move to California?

<table>
<thead>
<tr>
<th>Month</th>
<th>Year</th>
</tr>
</thead>
<tbody>
<tr>
<td>Feb</td>
<td>2008</td>
</tr>
</tbody>
</table>

You need to click yes in order to be eligible for the Dream Act.
Citizenship

Undocumented students can choose "No Selection"

What is your country of citizenship?
Country
No Selection

Social Security Number

If you have a Social Security number, please enter it.

Re-enter your Social Security number.

Leave this blank if you are Dream Act/AB 540 – eligible.
UC Applications

- The UC system has a website with tips for undocumented students who apply: [http://undoc.universityofcalifornia.edu/](http://undoc.universityofcalifornia.edu/)
Choosing a Major

- Claire Trevor School of the Arts
- Program in Nursing Science
- Program in Public Health
  - Public Health Policy
  - Public Health Sciences
- School of Biological Sciences
- The Henry Samueli School of Engineering
- The Paul Merage School of Business
- Interdisciplinary Studies
- School of Humanities
- Department of Pharmaceutical Sciences
- Donald Bren School of Information and Computer Sciences
- School of Physical Sciences
- School of Social Ecology
- School of Social Sciences
- Undeclared Majors

No Alternate Major
## Ranking San Diego Colleges

**UC San Diego College Preference**

UC San Diego’s distinctive colleges provide smaller “home” communities where undergraduate students get to know each other and faculty members better than in most large research universities.

Learn more about the college system before deciding on your UCSD college preferences.

### UCSD Principles of Community

These principles of community are vital to the success of the University and the well-being of its constituents. UCSD faculty, staff, and students are expected to practice these basic principles as individuals and in groups.

Please enter a number from 1 - 6 next to each of the UCSD colleges below based on the order you would prefer to attend.

- Revelle College
- John Muir College
- Thurgood Marshall College
- Earl Warren College
- Eleanor Roosevelt College
- Sixth College

**Rank order does NOT affect chances of admission.**
Scholarships

**Scholarship Opportunities**

UC awards scholarships to students with specific backgrounds, academic interests or career objectives. The characteristics used to determine eligibility for these scholarships are grouped into eight categories, which are listed below. Click on a category to view the list of scholarships and check the appropriate box(es) to indicate the characteristics that apply to you. You may select up to 16 characteristics.

- Academic Major or Specialty  (0 selected)
- Affiliation With Group, Program or Organization  (0 selected)
- Ancestry or Family Relationship  (0 selected)
- Career Plans  (0 selected)
- Ethnicity, National Origin or Religion  (0 selected)
- School or Geographic Affiliation  (0 selected)
- Special Conditions  (0 selected)
- Miscellaneous  (0 selected)

Review and select up to 16 scholarships that match your characteristics, interests, and background!
# About You

## Family Size & Income

Do you receive financial support from a parent/legal guardian? For example, can a parent/legal guardian claim you as a dependent?

This Year (2013):

- [ ] Yes
- [ ] No

Last Year (2012):

- [ ] Yes
- [ ] No

How many people are in your family?

Please include yourself, your parents, and any other dependents in your household.

This Year (2013):

Please include yourself, your parents, and any other dependents in your household.

Last Year (2012):

What is your estimated total household income to support the family size above?

This Year (2013):

- [ ] $ 0.00

Last Year (2012):

- [ ] $ 0.00

You must complete this section if you are applying for EOP. There is no separate application for EOP.

If you are not applying for EOP, this section is optional.
7th and 8th Grade Courses

### Advanced Courses in Mathematics

<table>
<thead>
<tr>
<th>Course Name</th>
<th>No. of Semesters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Algebra</td>
<td>2</td>
</tr>
</tbody>
</table>

### Courses in Language Other Than English

<table>
<thead>
<tr>
<th>Course Name</th>
<th>No. of Semesters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spanish 1</td>
<td>2</td>
</tr>
</tbody>
</table>

Make sure to pay attention to what page you’re on!
High Schools Attended

Click “Semester” under “... term system”
HS Courses & Grades

Your school’s a-g courses are already in the UC application system. Just open the subject area and select the course.

<table>
<thead>
<tr>
<th>Course Name</th>
<th>Honors Type</th>
<th>Grade 1</th>
<th>Grade 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>9th Grade History/Social Science</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9th Grade English</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9th Grade Mathematics</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9th Grade Laboratory Science</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9th Grade Language Other Than English</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9th Grade Visual and Performing Arts</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Stage Design AB
- Theatre Arts Workshop AB
- Advanced Band AB
- Choir AB
- Design AB
# HS Courses & Grades

Add any courses you took that aren't in the list above.

<table>
<thead>
<tr>
<th>Subject Area/Course Category</th>
<th>Course Name</th>
<th>Honors Type</th>
<th>Grade Term 1</th>
<th>Grade Term 2</th>
<th>Grade Term 3</th>
<th>Grade Term 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Biological Sciences</td>
<td>Botany</td>
<td>NH</td>
<td>A</td>
<td>NO</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Botnet</td>
<td></td>
<td></td>
<td>--</td>
<td>--</td>
<td>--</td>
<td>--</td>
</tr>
</tbody>
</table>

**ADD ANOTHER COURSE**

If you’re including non a-g courses, you will need to self-enter the course info.
College Courses Taken in HS

DIABLO VALLEY COLLEGE, 004295-3
ALL LOCATIONS, CA

<table>
<thead>
<tr>
<th>Dates</th>
<th>Grade/Term</th>
<th>Grading Sys</th>
</tr>
</thead>
<tbody>
<tr>
<td>06/2013-08/2013</td>
<td>1st Grade</td>
<td>A B C D F</td>
</tr>
</tbody>
</table>

**ADDITIONAL COURSES:**

- **Biological Science**
- **Business**
- **Business Accounting**
- **Chemistry**
- **Chinese**

<table>
<thead>
<tr>
<th>Dept.</th>
<th>Course No.</th>
<th>Course Title</th>
<th>Units</th>
<th>Grade</th>
<th>Subject Area/Course Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>CHIN</td>
<td>120</td>
<td>First Term Mandarin Chinese</td>
<td>5</td>
<td>B</td>
<td>Yr 2 Lang Other Than English</td>
</tr>
<tr>
<td>CHIN</td>
<td>121</td>
<td>Second Term Mandarin Chinese</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CHIN</td>
<td>220</td>
<td>Third Term Mandarin Chinese</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
**Academic History Comments**

**Additional Comments (optional)**

Tell us anything else you want us to know about your academic record that you have not had the opportunity to describe elsewhere in this section.

*International applicants:* If you selected Other as your school's grading system, please explain the grading system here.

(Entries over 550 characters will be truncated. The following characters count as more than one & < and new lines.)

Character Count: 150  Character Remaining: 395

A student can use this space to explain unusual circumstances about a course, grade received or the school itself. The space is limited to 550 characters.
Activities and Awards

- Non a-g Coursework
- Educational Preparation Programs
- Community Service
- Work Experience
- Awards & Honors
- Extra Curricular Activities

Choose up to 5 of your most meaningful experiences for each category.
Test Scores

ACT & SAT

Check which test(s) you have taken or plan to take:

☐ ACT Assessment  ☐ SAT Reasoning Test  ☐ Neither

Report your ACT/SAT scores below. Please remember:

• Record your scores exactly as they were reported by the testing agency.
• If you have taken a test more than once, record your highest overall score.
• Tests taken before February 2005 will not meet UC's Examination Requirement.

ACT Assessment Plus Writing

When did you take this test?

Month  Year

Scores

<table>
<thead>
<tr>
<th>Composite</th>
<th>English</th>
<th>Mathematics</th>
</tr>
</thead>
<tbody>
<tr>
<td>23</td>
<td>28</td>
<td>26</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Reading</th>
<th>Science</th>
<th>Combined English/Writing</th>
<th>Writing</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>28</td>
<td>28</td>
<td>12</td>
</tr>
</tbody>
</table>

☐ I have not received my scores yet.

If you plan to take or retake this test, what is the test date?

Month  Year

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2013</td>
<td>2013</td>
</tr>
</tbody>
</table>

Self-report your scores here and order official scores to be sent to at least one UC campus.
Test Scores

College Board Advanced Placement (AP) Examinations

Report your AP exam scores below. Please remember:

- Record your scores exactly as they were reported by the testing agency.
- If you have taken an exam more than once, record your highest overall score.

Add an AP Exam

When did you take or when do you plan to take the exam?

Month Year
May 2011

What was the exam name?
Calculus AB

What was your score?
3 I have not received my score yet.
The Personal Statement

- 2 Prompts – applicant must address both
- 1,000 word total or less
- View as a personal interview on paper
- Compose responses outside of the application and request feedback from teachers, counselors, parents and/or friends
- Paste your responses in plain text
The Personal Statement

**Statement 1:** Describe the world you come from — for example, your family, community or school — and tell us how your world has shaped your dreams and aspirations.

**Statement 2:** Tell us about a personal quality, talent, accomplishment, contribution or experience that is important to you. What about this quality or accomplishment makes you proud, and how does it relate to the person you are?
Additional Comments

Use the space provided to describe a situation (personal or academic) that needs further explanation and not fully captured elsewhere in the application.

This is NOT a continuation of the personal statement.
Submitting the Application

Disabled until all circles are solid.
Completeness Check

Completeness Check

To be sure you submit an accurate application, please closely review the information below before continuing with the submission process.

If you are satisfied that your entries are correct and reflect what you intended to submit, check the corresponding confirmation box(es), then click "Next". If any portion seems incorrect or incomplete, click "Previous" to return to the Application Summary, then edit your entries.

Missing Coursework in Subject Area
The coursework you reported in Academic History - High School Courses and Grades does not appear to satisfy our minimum requirements. (Note: You may have met these requirements through examination (SAT, AP, IB), which is reflected in the A-G Subject Requirements box above.)

Your coursework report indicates you have not met the history/social sciences requirement.
☐ Check this box to confirm this is what you intended to submit.

Missing Coursework in Grade Level
You entered 0 courses for the 10th grade or you did not indicate that you attended the 10th grade.
☐ Check this box to confirm this is what you intended to submit.
Releases & Signature

I authorize the University of California to release to my parents/legal guardian or spouse information regarding my application, including test scores, transcripts, and other supporting documents, as they relate to my admission and scholarship status.

Without this authorization, information regarding your application will not be disclosed to your parents/legal guardian or spouse. For example, if you do not check this box, they cannot inquire about the receipt of your application, transcripts or other supporting documents, nor inquire about the status of your application. You may log back into your application at any time to change this authorization.

I authorize the University of California to release to my school or college counselor/counseling office (or sponsoring agency) information regarding my application, including test scores, transcripts and other supporting documents, as they relate to my admission and scholarship status.

If you do not check the box, UC may not inform your school or counselor whether you have applied or been admitted. You may log back into your application at any time to change this authorization.

Electronic Signature and Statement of Integrity

By submitting this application, you authorize the University of California to release application information, including copies of your application and test scores, to any UC campus for admission or scholarship consideration.

I certify that my application and all information submitted during the admission process — including my academic record, personal statement, awards, activities, and supporting materials — are my own work, factually true and correct, and honestly presented. I understand that I am responsible for the accuracy of the application and that the University of California may verify the information.

I further understand that withholding information or giving false information may be cause for denial of admission, withdrawal of an admission offer, registration cancellation, expulsion, or revocation of a University of California degree.
Fees, Payment & Waivers

$70 per campus.

This is NON-REFUNDABLE!

You can get up to 4 fee waivers if you’re eligible.

Application Fees
Application fees are not refundable. Once your application has been submitted, you are expected to pay for all your campus choices even if you cancel a campus at a later date.

Billing Amount
The application fee of $70 entitles you to apply to one UC campus. If you selected more than one campus, you must pay an additional $70 for each campus you applied to.

<table>
<thead>
<tr>
<th>Campus(es) Selected</th>
<th>Berkeley</th>
<th>Davis</th>
<th>Irvine</th>
<th>San Diego</th>
<th>Santa Cruz</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Fee Total</td>
<td>$350.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(campus(es) x $70)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Due</td>
<td>$350.00</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Application for Fee Waiver
UC will waive application fees for up to four campuses for qualified students who otherwise would be unable to apply. Would you like to apply for a fee waiver?

You can apply for a fee waiver ONLY once, so make sure the info is correct the first time!

You cannot go back to change it.
Submit

Review & Submit  STEP 7 OF 7

Application Submission

You're not finished yet! Submit your application to receive your UC Application ID and receipt. You will receive an e-mail shortly after you submit noting that your application was received.

SUBMIT APPLICATION FOR UC ADMISSION

Congratulations! You have submitted your application to the University of California.

Receipt

University of California Fall Quarter/Semester 2014 Application

Thank you, Kansis Everdeen.

Your application for undergraduate admission and scholarships for Fall Quarter/Semester 2014 has been received. An e-mail confirmation will be sent to hyouonwu@gmail.com shortly.

PLEASE PRINT THIS RECEIPT AND KEEP IT FOR YOUR RECORDS.

Payment Information
Application ID: 1901055
Date: 09/05/2013
Payment Method: Mail
After You Submit

My UC Application

Welcome back, Katniss Everdeen

- Update Account Information
- Start a New Application
- Fall Quarter/Semester 2014 Application
  - View Fees and Payments
  - View Application
  - Update Personal Information
  - Update Release Authorization
  - Update ACT & SAT Tests
  - Update SAT Subject Tests
  - Update TOEFL or IELTS-Academic
  - Update International External Exam
  - Add Campus Choice
  - Application Status

Print your UC App ID from your email.

You will need it for communication with any campus.
Purpose
The purpose of this lesson is to support students in writing their UC Personal Statement.

Materials and Handouts
Cal Personal Statement Handout
Essay Writers Worksheet
UC Personal Statement Worksheet
UC Personal Statement Tips
Person Statement Rubric
http://admissions.berkeley.edu/personalstatement

Student-Facing Instructions
Your personal statement essay is your chance to explain to college admission readers why you are a good candidate for their school. It’s an opportunity to express your individuality, personality, goals and experiences, and explain any obstacles or opportunities that have impacted who you are today. Much more than a mandatory assignment, the personal statement is one item of the college application/admission process that will receive close scrutiny and demands your best thinking and writing.

Review the attachments and the task rubric before you set out to write. You need to respond to both prompts, with a total word limit (between both prompts) of 1000 words.

PROMPT #1
Describe the world you come from - for example, your family, community, or school - and tell us how your world has shaped your dreams and aspirations.

PROMPT #2
Tell us about a personal quality, talent, accomplishment, contribution, or experience that is important to you. What about this quality or accomplishment makes you proud?

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Teacher Resource

Teacher Notes

This lesson is specific to the University of California campuses. Make sure students adhere to the word limit. Check links as information may change over time.

Assessment

Culminating Assessment: Personal Statement assessed against aligned rubric:

- Student Learning Outcomes assessed in this task:
- Develops an argument about oneself and draws meaningful connections and conclusions
- Uses specific and relevant evidence from one’s life
- Addresses a college admissions audience with meaning and purpose
- Organize and structure argument consistently and logically
- Skillfully uses written language to convey ideas and understanding

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Your personal statement essay is your chance to explain to college admission readers why you are a good candidate for their school. It’s an opportunity to express your individuality, personality, goals and experiences, and explain any obstacles or opportunities that have impacted who you are today. Much more than a mandatory assignment, the personal statement is one item of the college application/admission process that will receive close scrutiny and demands your best thinking and writing.

Review the attachments and the task rubric before you set out to write. You need to respond to both prompts, with a total word limit (between both prompts) of 1000 words.

PROMPT #1

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PROMPT #2

Tell us about a personal quality, talent, accomplishment, contribution, or experience that is important to you. What about this quality or accomplishment makes you proud?

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
What is the Personal Statement?
The personal statement is more than just a mandatory part of your UC application; it's your chance to explain to college admissions readers why you are a good fit for their school. It's where you become an individual, and where you can share your personality, your goals, your experiences, and explain any opportunities or obstacles that have affected your academic record.

- It's one element considered in UC’s comprehensive review of your application.
- It's an opportunity to provide information that gives readers context for your accomplishments.
- Adds clarity, depth, and meaning to information collected in other parts of your application.

Where do I start?
The personal statement is made up of two prompts; all applicants are required to answer both. You will be writing two essays in response to these prompts. The length of each response is up to you, but neither one should be less than 250 words nor the combination of both responses should not exceed 1,000 words.

Get familiar with the prompts. Learn what they are asking you and answer all parts of the question. Start by brainstorming possible essay topics and always make sure that you stick to one topic per response.

Prompt 1 Describe the world you come from—for example, your family, community or school—and tell us how your world has shaped your dreams and aspirations.

Prompt 2 Tell us about a personal quality, talent, accomplishment, contribution or experience that is important to you. What about this quality or accomplishment makes you proud and how does it relate to the person you are.

The Writing Process
Try to follow these steps as you're working on your personal statement:

1. Brainstorm using levels of questions
2. Write a first draft
3. Get feedback. Give readers at least a week to respond.
4. Revise for organization, clarity, and meaning.
5. Proofread your close-to-final draft to

©2010 UC Berkeley, Center for Educational Partnerships
Essay Writer’s Checklist

USE THE FOLLOWING AS A GUIDE FOR A SELF-EVALUATION OF YOUR ESSAY

- Did you use the pronoun “I”?  
  Writing in the first person will help you to convey your individuality.

- Did you think about your audience?  
  The challenge is to write an essay that will be interesting to an admissions officer who has read hundreds of essays before yours. Be creative!

- Does your essay have a main point or thesis?

- Is your entire writing original?

- Is your topic appropriate for a college essay?  
  This is not the time to play “true confessions.”

- Does your essay have a captivating introduction, a relevant middle and a strong ending?

- Does your essay answer the question?

- Did you write and rewrite?  
  Remember the process of brainstorming, outlining, writing, rewriting and proofreading.

- Did you get a second opinion?  
  Your English teacher can be a good sounding board and offer constructive criticism.

- Did you adhere to any length requirements?  
  Admissions will stop reading at the length limitation.

- Does the essay represent your best work?  
  It should!
Prompt 1 - Describe the world you come from—for example, your family, community, or school—and tell us how your world has shaped your dreams and aspirations.

Prompt 2 - Tell us about a personal quality, talent, accomplishment, contribution or experience that is important to you. What about this quality or accomplishment makes you proud and how does it relate

Tips:
- Stay within the word limit (1,000 words between the 2 prompts)
- If describing a hardship, be sure to explain how you overcame it
- Remember this is a “PERSONAL” statement so be sure to not elaborate too much on others
- This is not a time to be clever or funny
- Be sure to look at your transcript to see if there is any gaps that needs further explanation

University of California

All 9 UC’s require students to write a personal statement. The personal statement is a vital part of the application process. Be sure to take your time to read and answer both prompts above.
THE UC PERSONAL STATEMENT

WHAT IS THE PERSONAL STATEMENT? The Personal Statement is an integral part of the UC application. The content of the Personal Statement should add clarity, richness and meaning to the information you present in other parts of your UC application, enabling the Office of Admissions to form the best impression of you.

TECHNICAL INFORMATION

• You have 1,000 words to answer both prompts.
• Your shortest response should be at least 250 words.
• Avoid the use of special characters.
• Feedback and suggestions from others are useful, but you are responsible for writing the Personal Statement.

PERSONAL STATEMENT PROMPTS

Prompt #1 (Freshman):
Describe the world you come from – for example, your family, community or school – and tell us how your world has shaped your dreams and aspirations.

Suggestions for Prompt #1 (Freshman)
• You don’t need to talk about family and community and school. Pick one and be descriptive.
• Keep your response relevant; focus on events that happened in the four years of high school.

Prompt #1 (Transfer):
What is your intended major? Discuss how your interest in the subject developed and describe any experience you have had in the field – such as volunteer work, internships and employment, participation in student organizations and activities – and what you have gained from your involvement.

Suggestions for Prompt #1 (Transfer)
• Consider including coursework experience. This may include working with faculty or doing research projects.

Prompt #2 (All Applicants):
Tell us about a personal quality, talent, accomplishment, contribution or experience that is important to you. What about this quality or accomplishment makes you proud and how does it relate to the person you are?

Suggestions for Prompt #2
• Think about answering this prompt first, as it may help set the context you want to describe in Prompt #1.
• Choose a topic that has not been addressed in detail in another section of the application.
• Keep the information relevant to your personal experiences.

SUGGESTIONS FOR WRITING THE PERSONAL STATEMENT

Answer the question. Take time and think about each prompt before you start writing. Use details and examples to make your point. Use your words strategically. Write to add context and depth, not to fill space.

Give yourself time to edit. Start writing to answer each prompt, then go back and review the word count, content and overall message. You may not have space to tell us everything so make your words count.

Stick to one topic per response. Making a list of accomplishments, activities, awards or work will lessen the impact of your words. Expand on a topic by using examples and facts for maximum impact to an Admissions reader.

Brainstorm topics. When you are composing your Personal Statement, consider including:
• Personal triumphs or challenges – If you decide to talk about a challenge or triumph, do not forget to explain what you learned from the experience.
• Leadership opportunities – Define your leadership role, your accomplishments and what you learned from the experience.
• Experiences outside the classroom – Consider experiences that have made an impact on your life (e.g., travels, church or temple, work, youth groups or your family).
• Disabilities – If you are living with a disability, talk about it! What does it mean to live with your disability?
• Culture – Describe the influence culture has had on you. Don’t define the culture; instead explain what you have learned because of that culture.

Stay focused. Avoid common mistakes:
• Don’t be campus specific. You’re talking to all the UC campuses in your response.
• Inappropriate use of humor.
• Creative writing (poems, scene-setting or clichés).
• Scene-setting – We don’t need to be in the moment with you.
• Quotations – We want to know your thoughts and words, not someone else’s.
• Generalities – Stick to facts and personal examples.
• Repetition – Give us new information we cannot find in other sections of the application.
• Philosophy – Don’t ask questions. Get to the point and tell us what you mean.
• Acronyms – We won’t look it up, so spell it out.
THE UC PERSONAL STATEMENT

The following worksheet is geared to help you start the writing process for your Personal Statement on the freshman application. There is no 'correct' answer to the Personal Statement, so just start writing. The UC application is available online at www.universityofcalifornia.edu/apply. Additional hints and suggestions can be found on the University of California website. Good luck!

Prompt #1:

Describe the world you come from – for example, your family, community or school – and tell us how your world has shaped your dreams and aspirations.

Ask yourself these questions. What answer do you want to share with us that we have not seen elsewhere in your application?

- What are the challenges or opportunities you find in your community?
- What role do you play in your family, and how has that influenced your decisions in and out of school?
- Do you identify with one or more cultures? Can you speak more than one language? What has that allowed you to do in life?
- What is a typical day or week in your life, and how do you manage to accomplish everything?
- What is your school like? Are you in a magnet or academy? Describe the program and why you enrolled.
- How are you challenging yourself in school to prepare for college? Is attending college common for graduating seniors?
- If you hold a leadership role: Did you apply or were you nominated? What does that role mean at your school or in your community? How did you grow in this role?
- Do you have a major or career in mind? What is it and why did you choose it? Are there any courses and/or extracurricular activities you have completed to get you started in this area?

Prompt #2:

Tell us about a personal quality, talent, accomplishment, contribution or experience that is important to you. What about this quality or accomplishment makes you proud and how does it relate to the person you are?

Things to consider before answering Prompt #2:

- Make a list of four things that describe you (e.g., athletic, a leader, first in my family to go to college, started a club, own my own business, etc.):
  1. __________________________
  2. __________________________
  3. __________________________
  4. __________________________

Now ask a friend or family member to do the same thing:

  1. __________________________
  2. __________________________
  3. __________________________
  4. __________________________

Did anything overlap? Can you see areas where you want to share more information? If so, consider using this topic to respond to Prompt #2.

- What do you consider one of your strengths?
- What activities, awards or honors do you wish to discuss?

Final hints:

The Personal Statement is your interview with the University of California.

We don’t look at writing style; we look for content. Your response should add clarity, depth and/or context to the application as a whole.

Be you. Use plenty of “I” statements. Talk about yourself so that we can get to know your personality, talents, accomplishments and potential for success on a UC campus.
The personal statement—consisting of responses to two prompts—is reviewed by both the Admissions and the Scholarship Offices.

Please read the complete information about the personal statement provided in the application. These are the prompts you will be asked to answer.
# ECCCO College Access: Personal Statement/College Essay Rubric

**Student Learning Outcomes:**
- **Claim:** Develops an argument about oneself and draws meaningful connections and conclusions (NEW)
- **Evidence:** Uses specific and relevant evidence from one’s life (NEW)
- **Audience/Purpose:** Addresses a college admissions audience with meaning and purpose (NEW)
- **Organization:** Organize and structure argument consistently and logically (CES)
- **Language Use:** Skillfully uses written language to convey ideas and understanding (CES)

<table>
<thead>
<tr>
<th>Scoring Domain</th>
<th>Emerging</th>
<th>Developing</th>
<th>Proficient</th>
<th>Advanced</th>
</tr>
</thead>
</table>
| **Claim** | - Contains an unidentifiable claim or vague position  
- Does not explain background and context of topic/issue  
- Draws superficial connections or conclusions | - Introduces a claim that takes a position  
- Somewhat explains background and context of topic/issue  
- Draws general or broad connections or conclusions | - Introduces a precise claim that takes an identifiable position  
- Explains background and context of topic/issue  
- Makes specific connections and draws meaningful conclusions | - Makes a compelling claim that takes a purposeful position  
- Thoroughly explains background and context of topic/issue  
- Makes insightful connections, draws meaningful conclusions, and raises important implications |
| **Evidence** | - There are general statements and no meaningful examples to support the thesis/theme/topic | - The examples used to support the theme are too general and unspecific | - Paragraphs contain specific examples from the student’s life to support their claims and plans for the future | - Paragraphs contain specific, important and insightful examples from the student’s life that justify the argument |
| **Audience/Purpose** | - Illustrates an inconsistent awareness of the audience’s knowledge level and needs  
- The reader is confused  
- “So what?” remains a question | - Considers the needs of the audience (including knowledge level, concerns, values)  
- The effect on the reader & direction of the writer is apparent  
- The answer to “So what?” is superficial | - Addresses the needs of the audience (including knowledge level, concerns, values)  
- The reader understands more or less what the writer envisioned and gains a | - Addresses the specific needs of the audience (including knowledge level, concerns, values)  
- The reader can understand the writer’s message easily and gain significant insight  
- The writer answers: “So what?” with authenticity |
Apply

to Private
Checklist Task: Common Application

Purpose
The purpose of this activity is to inform students about the steps needed to complete the Common Application.

Suggested Grade Level:
12

Materials and Handouts
Common Application Tips
Counselor Guide
The Common App

Approximate Time Needed:
Varies

Student-Facing Instructions
Use the powerpoint and student handout with highlights & tips for specific sections of the Common Application.


Use the video titles to choose the section of the application you’re interested in learning about (i.e. “Common App Part 7 Activities”, “Common App Part 11 Recommendations”)

Teacher Notes
Most private colleges/universities and some state colleges/universities use the Common Application. Check www.commonapp.org for an updated list of Common App member institutions. You will need to update the included Google Presentation based on your school and the specific school year. Be sure to tailor instructions based on your school’s use of Naviance or other college document communication tool.

Assessment
Checklist Assessment: Completion of the Common Application as verified by screenshot of submission page or email confirmation.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Use the powerpoint and student handout with highlights & tips for specific sections of the Common Application.


Use the video titles to choose the section of the application you’re interested in learning about (i.e. “Common App Part 7 Activities”, “Common App Part 11 Recommendations”)

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Common Application Tips

The common application is used by most private schools and some non-CA state schools. If at all possible, you should use the common application to apply to a school.

What you will need:
1. Your social security number, if you have one.
2. Your home address.
3. A copy of your transcript.
4. Information on where your parents or your siblings went to college and graduate school, and what year they graduated, if applicable.
5. Credit card OR fee waiver information, if applicable. See your mentor for the purple form.

General Tips:
- You will need a Web browser that has Javascript activated and Cookies enabled.
- You must logout of the online application after each session.
- After each step, use the “save and next” button on your actual application. Do not use the buttons on your browser.

First Steps:
1. Go to commonapp.org.
2. Create a user name and password by registering. Write this down! You are a first year student.
3. Make sure you put in an email address that you check. This is essential.
4. Go to Naviance and type this in under your information.
5. Return to commonapp.
6. Start at my colleges. Add in each college you are planning to apply to that accepts the common app.
7. If you need financial aid, MAKE SURE you click “yes” to the question about need-based financial aid.

Demographics:
- Colleges are looking for diversity, so we recommend you place your ethnic/racial background in your application.

Family:
- You should definitely put in where your parents and siblings went to college, if applicable. This is taken into account when schools process your application.

Academics:
- The CEEB code:
- You entered high school in 8/2012 and you will graduate 6/13/2016.
- Your counselor is:
- Add in any college courses you have taken at summer programs or community college.

Tests:
- You can put in the dates that you will be taking tests in the future.
- Be sure to report all test scores.

Extracurriculars:
- If you have it, use your resume from college readiness class.
- Include all work, volunteer, sports, musical, religious experiences here. Anything you do outside of school!
- Be as specific as possible and use the description box (i.e. Varsity Soccer Captain)
- Check the appropriate box(es) for years of involvement. Average your hours/week per year and round up.
- This is a place to boast and brag.
Writing:
- Make sure you save a copy of your essay elsewhere. DO NOT type directly into the spaces. Copy and paste your essay. This way, in case there is a technical glitch, you have already saved a copy.
- If you have unusual circumstances or you are undocumented, you should discuss it in the “additional information” section.

Supplements:
- Some colleges require supplemental essays or other information.
- If a school needs supplemental materials, your application to that school will not be considered complete until you submit the supplements.

School Forms:
- We do not fill out paper forms for the common app.
- All teacher and mentor forms are submitted via Naviance.
- Secondary School Reports, Mid Year reports, and final reports are filled out by:
  - Teacher Evaluations are filled out by your teacher recommenders.
  - If you are applying early, you MUST fill out the early decision agreement.

After you fill out your application:
1. Sign, pay for and submit your application.
2. Print a copy of the application AND the submission receipt for your reference and just in case.
3. Make sure all your schools as well as your common app login are in Naviance.
4. Notify your teacher recommenders of the schools and the deadlines at least two weeks prior to the deadline.
5. Notify your counselor about which schools you are applying to and what they deadlines are at least two weeks prior to the deadline. They will need to do Secondary School reports.
6. MAKE sure you submit any supplements for specific schools.
7. Go to collegeboard.com and/or ACT.com and request score reports to be sent to each school you have applied to.
8. Keep checking your email regularly (at least 2-3 times per week) for information or requests from colleges.
This guide displays the sections and pages within The Common Application. It is designed to familiarize students with the information they will be asked to report and is not intended to be a comprehensive collection of all questions within the application.

| PROFILE | Contacts |
|------------------------------------------------|
| Email address, phone number, mailing address |

| PROFILE | Demographics |
|------------------------------------------------|
| Religion, military service, race/ethnicity (all optional) |

| PROFILE | Geography |
|------------------------------------------------|
| Birthplace, countries lived in, language proficiency, citizenship |

| FAMILY | Household |
|------------------------------------------------|
| Parent marital status, parent(s) with whom you reside |

| FAMILY | Parent and/or Guardian |
|------------------------------------------------|
| Name, birthplace, occupation, education, stepparent information |

| FAMILY | Siblings |
|------------------------------------------------|
| Age, grade, education |

| EDUCATION | School |
|------------------------------------------------|
| Current school, dates attended; counselor name, phone, and email |

| EDUCATION | History |
|------------------------------------------------|
| Previous schools, dates attended, past/pending education interruptions (e.g. time off, early graduation, gap year, etc.), college courses, college assistance programs |

| EDUCATION | Academic Information |
|------------------------------------------------|
| GPA, class rank, current year courses, honors and awards |

| TESTING | College Entrance |
|------------------------------------------------|
| ACT and SAT |

| TESTING | English For Non-Native Speakers |
|------------------------------------------------|
| TOEFL, IELTS, PTE Academic |

| TESTING | Academic Subjects |
|------------------------------------------------|
| AP, IB, SAT Subject Tests, A-Levels |

| TESTING | Other |
|------------------------------------------------|
| Optional reporting for other relevant 9-12 testing |

<p>| ACTIVITIES | Principal Activities/Work |
|------------------------------------------------|
| Years of participation, hours per week, weeks per year, position/leadership held (50 characters), brief description (150 characters). 10 activities maximum. |</p>
<table>
<thead>
<tr>
<th>ESSAY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select One, 650 Words Maximum</strong></td>
</tr>
<tr>
<td>• Some students have a background or story that is so central to their identity that they believe their application would be incomplete without it. If this sounds like you, then please share your story.</td>
</tr>
<tr>
<td>• Recount an incident or time when you experienced failure. How did it affect you, and what lessons did you learn?</td>
</tr>
<tr>
<td>• Reflect on a time when you challenged a belief or idea. What prompted you to act? Would you make the same decision again?</td>
</tr>
<tr>
<td>• Describe a place or environment where you are perfectly content. What do you do or experience there, and why is it meaningful to you?</td>
</tr>
<tr>
<td>• Discuss an accomplishment or event, formal or informal, that marked your transition from childhood to adulthood within your culture, community, or family.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>EXPLANATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Required Responses</strong></td>
</tr>
<tr>
<td>Explanations regarding school discipline¹, criminal history², education interruption, veteran discharge status</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ADDITIONAL INFO</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Optional Responses</strong></td>
</tr>
<tr>
<td>Relevant circumstances or qualifications not reflected elsewhere in the application</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COLLEGE PAGE 1</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>General</strong></td>
</tr>
<tr>
<td>Entry term, degree status, housing preference, test-optional preference, scholarship and financial aid preference</td>
</tr>
</tbody>
</table>

**Academics**
Academic interest, program(s) applying to

**Contacts**
Interactions with the institution (campus visit, off-campus interview, etc.)

**Family**
Family members who have attended or been employed by the institution

**Evaluations**
Names of classroom teachers, coaches, other recommenders

**Residence**
Required by some public institutions to determine in-state status

**Signature**
Acknowledgments and affirmations

(Not all member colleges will ask all questions.)

<table>
<thead>
<tr>
<th>COLLEGE PAGE 2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Writing Supplement</strong></td>
</tr>
<tr>
<td>Additional short answer or essay responses if requested by institution</td>
</tr>
</tbody>
</table>

---

1. Have you ever been found responsible for a disciplinary violation at any educational institution you have attended from the 9th grade (or the international equivalent) forward, whether related to academic misconduct or behavioral misconduct, that resulted in a disciplinary action? These actions could include, but are not limited to: probation, suspension, removal, dismissal, or expulsion from the institution.

2. Have you ever been adjudicated guilty or convicted of a misdemeanor, felony, or other crime? Note that you are not required to answer "yes" to this question, or provide an explanation, if the criminal adjudication or conviction has been expunged, sealed, annulled, pardoned, destroyed, erased, impounded, or otherwise ordered by a court to be kept confidential.
The Common Application
Overview

The Common Application is used by most private colleges and some non-CA state colleges.

Create a log-in: https://commonapp.org/Login
What you’ll need

1. Your social security number, if you have one.
2. Your home address.
3. A copy of your transcript.
4. Information on where your parents or your siblings went to college and graduate school, and what year they graduated, if applicable.
5. Credit card OR fee waiver information, if applicable.
First Steps

1. Go to commonapp.org.
2. Create a user name and password by registering. Write this down! You are a first year student.
3. Make sure you put in an email address that you check. This is essential.
4. Go to Naviance and type this in under your information.
5. Return to commonapp.
6. Start at “my colleges.” Add in each college you are planning to apply to that accepts the common app.
7. If you need financial aid, MAKE SURE you click “yes” to the question about need-based financial aid.
Tips

Demographics:
- Colleges are looking for diversity, so we recommend you place your ethnic/racial background in your application.

Family:
- You should definitely put in where your parents and siblings went to college, if applicable. This is taken into account when schools process your application.
Academics:
- The CEEB code for our high school is:
- You entered high school in 8/2012 and you will graduate 6/13/2016.
- Your counselor is:
- Add in any college courses you have taken at summer programs or community college.
Tests:
• You can put in dates that you will be taking tests in the future.
• Be sure to report all test scores.

Extracurriculars:
• If you have it, use your resume.
• Include all work, volunteer, sports, musical, religious experiences here. Anything you do outside of school!
• Be as specific as possible and use the description box (i.e. Varsity Soccer Captain)
• Check the appropriate box(es) for years of involvement. Average your hours/week per year and round up.
• This is a place to boast and brag.
Writing

- Make sure you save a copy of your essay elsewhere. DO NOT type directly into the spaces. Copy and paste your essay. This way, in case there is a technical glitch, you have already saved a copy.

- If you have unusual circumstances or you are undocumented, you should discuss it in the “additional information” section.

[Common App Essay Prompts]
Supplements

- Some colleges require supplemental essays or other information.
- If a school needs supplemental materials, your application to that school will not be considered complete until you submit the supplements.
School Forms

- We do not fill out paper forms for the common app.
- All teacher and mentor forms are submitted via Naviance.
- Secondary School Reports, Mid Year reports, and final reports are filled out by your mentor.
- Teacher Evaluations are filled out by your teacher recommenders.
- If you are applying early, you MUST fill out the early decision agreement.
After you fill out your application

1. Sign, pay for and submit your application.
2. Print a copy of the application AND the submission receipt for your reference and just in case.
3. Make sure all your schools as well as your common app login are in Naviance.
4. Notify your teacher recommenders of the schools and the deadlines at least two weeks prior to the deadline.
5. MAKE sure you submit any supplements for specific schools.
6. Go to collegeboard.com and/or ACT.com and request score reports to be sent to each school you have applied to.
Finally...

Keep checking your email regularly (at least 2-3 times per week) for information or requests from colleges!
Unit Culminating Task:
Common Application Essay

Purpose
The purpose of this lesson is to support students in writing their Common Application Essay.

Materials and Handouts
Common App Essay Teacher’s Guide
Person Statement Rubric
https://apply.jhu.edu/apply/essays-that-worked/2018/
http://www.conncoll.edu/admission/apply/essays-that-worked/

Student-Facing Instructions

Part 1:
Read the Common Application essay prompts. Then read the Common Application essay examples. Discuss with your group evidence of what makes this a strong essay. Make a list of what to keep in mind as you write your essay.

Part 2:
Brainstorm topics and start writing your essay.

Teacher Notes
Make sure students adhere to the word limit. Check www.commonapp.org for information as it may change over time.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Assessment

Culminating Assessment: Personal Statement assessed against aligned rubric:

- Student Learning Outcomes assessed in this task:
  - Develops an argument about oneself and draws meaningful connections and conclusions
  - Uses specific and relevant evidence from one’s life
  - Addresses a college admissions audience with meaning and purpose
  - Organize and structure argument consistently and logically
  - Skillfully uses written language to convey ideas and understanding

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Part 1:
Read the Common Application essay prompts. Then read the Common Application essay examples. Discuss with your group evidence of what makes this a strong essay. Make a list of what to keep in mind as you write your essay.

Part 2:
Brainstorm topics and start writing your essay.
| Warm Up/Connection: | Think about and discuss: *What makes something you read memorable?*
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Explain:</td>
<td>Describe:</td>
</tr>
<tr>
<td></td>
<td>● What colleges look at (This is the order for Whitman College, other colleges may have different order, but if they’re asking for writing, it will be high on their list.):</td>
</tr>
<tr>
<td></td>
<td>○ transcript</td>
</tr>
<tr>
<td></td>
<td>○ writing</td>
</tr>
<tr>
<td></td>
<td>○ extra curricular activities</td>
</tr>
<tr>
<td></td>
<td>○ test scores</td>
</tr>
<tr>
<td></td>
<td>● Write for yourself or someone you know/care about. Not for an admissions officer.</td>
</tr>
<tr>
<td></td>
<td>● It’s a window into who you are as a person.</td>
</tr>
<tr>
<td></td>
<td>● Make it memorable.</td>
</tr>
<tr>
<td>Model:</td>
<td>1. Students read the Common App essay prompts:</td>
</tr>
<tr>
<td></td>
<td>● Some students have a background or story that is so central to their identity that they believe their application would be incomplete without it. If this sounds like you, then please share your story.</td>
</tr>
<tr>
<td></td>
<td>● Recount an incident or time when you experienced failure. How did it affect you, and what lessons did you learn?</td>
</tr>
<tr>
<td></td>
<td>● Reflect on a time when you challenged a belief or idea. What prompted you to act? Would you make the same decision again?</td>
</tr>
<tr>
<td></td>
<td>● Describe a place or environment where you are perfectly content. What do you do or experience there, and why is it meaningful to you?</td>
</tr>
<tr>
<td></td>
<td>● Discuss an accomplishment or event, formal or informal, that marked your transition from childhood to adulthood within your culture, community, or family.</td>
</tr>
<tr>
<td></td>
<td>2. Choose one or more essay examples that have been released by colleges: Johns Hopkins, Connecticut College (or elsewhere) to share with students.</td>
</tr>
<tr>
<td></td>
<td>3. Students read the example.</td>
</tr>
</tbody>
</table>
| Guided Practice: | 1. Ask students, in pairs or triads, to locate and discuss evidence of what makes this a strong
2. Have students share out their ideas.
3. Discuss the list and field questions.
4. Add any additional important points to the list.
5. Record this list for students to access later.

### Independent Practice:

<table>
<thead>
<tr>
<th>Independent Practice:</th>
<th>If students already have a 1st draft:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Students read the current version of their college essay and brainstorm ways to improve it.</td>
</tr>
<tr>
<td></td>
<td>2. Work on revising or completely rewriting their college essay.</td>
</tr>
<tr>
<td></td>
<td>If students don’t have a 1st draft:</td>
</tr>
<tr>
<td></td>
<td>1. Students brainstorm topics</td>
</tr>
<tr>
<td></td>
<td>2. Start drafting essay</td>
</tr>
</tbody>
</table>

### Extension ideas:

- Continue brainstorming topics
- Look at the [Common App prompts](https://commonapp.org), [UC Personal Statement prompts](https://www.universityofcalifornia.edu), [CSU EOP prompts](https://www.csueop.org) or a specific [scholarship prompt](https://www.fafsa.gov) to see where their essay can fit - and start tailoring it to that specific prompt.
- Hook exercises
- Check back to make sure their essays meet the criteria in the list the group created
- Peer editing

### Reflection:

<table>
<thead>
<tr>
<th>Reflection:</th>
<th>What have you changed about your essay?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What is your next step for your college essay?</td>
</tr>
</tbody>
</table>
### Student Learning Outcomes:
- **Claim**: Develops an argument about oneself and draws meaningful connections and conclusions (NEW)
- **Evidence**: Uses specific and relevant evidence from one’s life (NEW)
- **Audience/Purpose**: Addresses a college admissions audience with meaning and purpose (NEW)
- **Organization**: Organize and structure argument consistently and logically (CES)
- **Language Use**: Skillfully uses written language to convey ideas and understanding (CES)

<table>
<thead>
<tr>
<th>Scoring Domain</th>
<th>Emerging</th>
<th>Developing</th>
<th>Proficient</th>
<th>Advanced</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Claim</strong></td>
<td>- Contains an unidentifiable claim or vague position</td>
<td>- Introduces a claim that takes a position</td>
<td>- Introduces a precise claim that takes an identifiable position</td>
<td>- Makes a compelling claim that takes a purposeful position</td>
</tr>
<tr>
<td></td>
<td>- Does not explain background and context of topic/issue</td>
<td>- Somewhat explains background and context of topic/issue</td>
<td>- Explains background and context of topic/issue</td>
<td>- Thoroughly explains background and context of topic/issue</td>
</tr>
<tr>
<td></td>
<td>- Draws superficial connections or conclusions</td>
<td>- Draws general or broad connections or conclusions</td>
<td>- Makes specific connections and draws meaningful conclusions</td>
<td>- Makes insightful connections, draws meaningful conclusions, and raises important implications</td>
</tr>
<tr>
<td><strong>Evidence</strong></td>
<td>- There are general statements and no meaningful examples to support the thesis/theme/topic</td>
<td>- The examples used to support the theme are too general and unspecific</td>
<td>- Paragraphs contain specific examples from the student’s life to support their claims and plans for the future</td>
<td>- Paragraphs contain specific, important and insightful examples from the student’s life that justify the argument</td>
</tr>
<tr>
<td><strong>Audience/ Purpose</strong></td>
<td>- Illustrates an inconsistent awareness of the audience’s knowledge level and needs</td>
<td>- Considers the needs of the audience (including knowledge level, concerns, values)</td>
<td>- Addresses the needs of the audience (including knowledge level, concerns, values)</td>
<td>- Addresses the specific needs of the audience (including knowledge level, concerns, values)</td>
</tr>
<tr>
<td></td>
<td>- The reader is confused</td>
<td>- The effect on the reader &amp; direction of the writer is apparent</td>
<td>- The reader understands more or less what the writer envisioned and gains a</td>
<td>- The reader can understand the writer’s message easily and gain significant insight</td>
</tr>
<tr>
<td></td>
<td>- “So what?” remains a question</td>
<td>- The answer to “So what?” is superficial</td>
<td></td>
<td>- The writer answers: “So what?” with authenticity</td>
</tr>
</tbody>
</table>
Home > Apply > Essays That Worked > Class of 2018

**Essays That Worked (Class of 2018)**

Your essays are some of the most important pieces of your application. A well-crafted essay will convey to the admissions committee why Hopkins could be a good fit for you, and how you might contribute to the campus community.

- [Class of 2019](https://apply.jhu.edu/apply/essays-that-worked/2019/)
- [Class of 2018](https://apply.jhu.edu/apply/essays-that-worked/2018/)
- [Class of 2017](https://apply.jhu.edu/apply/essays-that-worked/2017/)
- [Class of 2016](https://apply.jhu.edu/apply/essays-that-worked/2016/)

Get essay writing tips from the Hopkins Insider.

Below, read selected examples of essays that “worked”, as nominated by our admissions committee. These selections represent just a few examples of essays we found impressive and helpful during the past admissions cycle.

These entries are distinct and unique to the individual writer; however, each of them assisted the admissions reader in learning more about the student beyond the transcripts and lists of activities. We hope these essays inspire you as you prepare to compose your own personal statements. The most important thing to remember is to be original and creative as you share your own story with us.
Tips from Dean Strickler
Fall 2015

Greetings from beautiful New London, Connecticut!

Friday, Aug. 28, 2015, was Move-in Day for first-year students at Connecticut College. I'll bet if you had asked them where they were last year they would have told you that Connecticut College is in Connecticut, but you probably aren't that naive. So I'll cut to the chase: you've been accepted and you're starting college -- congrats! Now, you're probably thinking, 'What's next?' To answer your question, I've outlined some things to do after acceptance that I think will make your college experience smooth and enjoyable.

1. Re-read your acceptance letter
2. Meet with your financial aid officer
3. Plan your courses for the fall semester
4. Explore your major options
5. Join campus organizations
6. Attend orientation programs
7. Meet with your academic advisor
8. Set up your online account
9. Apply for scholarships
10. Register for classes

Remember, college is an exciting time, but it can also be overwhelming. Take it one step at a time and you'll be fine. Welcome to the Connecticut College community!
Apply to Community College
Purpose
The purpose of this activity is to inform students about how to enroll in their local community college.

Suggested Grade Level:
12

Materials and Handouts
CA Community Colleges Presentation

Approximate Time Needed:
Varies

Student-Facing Instructions
Follow this presentation to assist you as you prepare to enroll in a community college.

Teacher Notes
This lesson is California-specific and the example presentation is Bay Area-specific. With 112 community college campuses in California, you will need to tailor the presentation to include specific information about the regional community colleges your students are most likely to attend. Some programs, such as TAG, are offered universally at California community colleges. Other programs and enrollment processes vary from campus to campus.

Assessment
Completion of community college enrollment as verified email of enrollment confirmation.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Follow this presentation to assist you as you prepare to enroll in a community college.
# Costs

<table>
<thead>
<tr>
<th>College</th>
<th>Appx Annual Cost*</th>
<th>Cost Breakdown**</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada College</td>
<td>$2,569</td>
<td>$828 Tuition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,681 books</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$60 fees</td>
</tr>
<tr>
<td>College of San Mateo</td>
<td>$3,056</td>
<td>$1,344 Tuition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,638 books</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$74 fees</td>
</tr>
<tr>
<td>Foothill College</td>
<td>$3,201</td>
<td>$1,395 Tuition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,665 books</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$141 fees</td>
</tr>
<tr>
<td>San Jose City College</td>
<td>$2,984</td>
<td>$1,288 Tuition</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$1,665 books</td>
</tr>
<tr>
<td></td>
<td></td>
<td>$31 fees</td>
</tr>
</tbody>
</table>

If you plan on living in off-campus housing (instead of at home), add $10,000 - $12,000 per year for room and board.

* As of 2012/2013 from cappex.com
** There are additional costs, such as parking and other student fees.
Financial Aid

✓ Complete the FAFSA first!

✓ Cal Grants
✓ Board of Governors Fee Waiver—for eligible students; based on financial need; waives the per unit & health fees.
✓ Research financial aid & scholarships on the specific community college’s website
✓ Loans
✓ http://www.icanaffordcollege.com/ (specifically for CA community colleges)
General Application Process

1. Apply online at [www.cccapply.org](http://www.cccapply.org). Use your CSUMentor username and password to log in.

2. Schedule an assessment (need to have your student ID number ready). Check out the test resources page at the community college you’re applying to:
   b. San Jose City College: [http://www.sjcc.edu/future-students/assessment-center](http://www.sjcc.edu/future-students/assessment-center)

3. Practice, practice, practice! These tests require as much effort as the EPT and ELM so make sure you go in prepared to do your best.

4. Take the assessment.
General Application Process

After your assessment:

- Meet with a college counselor to discuss assessment results and course selection.
- Attend a new student orientation (usually in April or May).
- Pick your courses together with a college counselor.
Priority Registration: Cañada College

Right after you apply online, reserve your seat for one of the PEP (Priority Enrollment Program) dates:

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monday, April 20, 2015</td>
<td>4:00 p.m. – 8:00 p.m.</td>
</tr>
<tr>
<td>Tuesday, April 21, 2015</td>
<td>4:00 p.m. – 8:00 p.m.</td>
</tr>
<tr>
<td>Wednesday, April 22, 2015</td>
<td>4:00 p.m. – 8:00 p.m.</td>
</tr>
<tr>
<td>Thursday, April 23, 2015</td>
<td>4:00 p.m. – 8:00 p.m.</td>
</tr>
</tbody>
</table>

[http://canadacollege.edu/pep/](http://canadacollege.edu/pep/)

On this day you will attend the orientation session first and then take the assessment test. *Please note that you must arrive a half an hour earlier than the starting time listed below to sign-in.*
Priority Registration at Skyline College

1. Apply online
   - Select “Summer/Fall Semester” even if you are not planning on summer classes. Once your application has been received, you will receive an email confirmation providing you with a G# and Enrollment Ticket. Please print out a copy of your student ID (G#) and enrollment ticket.

2. Sign up for PEP Day:
   - April 2015 - 9:00 AM - 5:00 PM
   - Orientation & Placement Test

http://www.skylinecollege.edu/outreach/priorityenrollment.php
Registration: San Jose City College

1. Apply online
2. Take your assessment test
3. Attend orientation
4. Meet with a counselor
5. Register for classes

http://www.sjcc.edu/future-students/apply-now
Registration at College of San Mateo

- Apply online.
- Print the confirmation page.
- CHECK YOUR EMAIL (including your spam folder) for important information from College of San Mateo regarding your admission and registration, including your student ID number and information about your next steps in the registration process.

http://collegeofsanmateo.edu/admissions/apply.asp
Registration at Foothill College

http://www.foothill.edu/admissions.php
Statistics About Community College

• 15% of students who started community college in 2006 completed a degree at a 4-year college within 6 years. (National Student Clearinghouse, November 2012)

• 60% of students who transferred from a community college to a 4-year college went on to complete their bachelor’s degree within 4 years of transferring. (National Student Clearinghouse, September 2012)

What does this information tell you?
Support Programs

In addition to Learning Centers, Health Centers, Counseling Centers and Transfer Centers, some community colleges offer additional support programs to ensure success at the community college and successful transfer to a 4-year college.
## Support Programs - some examples

<table>
<thead>
<tr>
<th>Program</th>
<th>For Whom?</th>
<th>What does it offer?</th>
<th>Application Process</th>
</tr>
</thead>
</table>
| “Beating the Odds” Peer Mentorship Program           | 1st generation college students    | ✓ One-on-one peer support  
✓ Learn about various resources on campus  
✓ Important college deadlines  
✓ Help with how to develop college success strategies  
✓ Financial aid services  
✓ College tours | Enroll in the fall. You must be enrolled in at least 6 units. Application online. |
| EOPS (Extended Opportunity Programs & Services)       | Low-income                        | ✓ Counseling  
✓ priority registration  
✓ book services  
✓ Workshops  
✓ transfer services  
✓ Other types of support | Enroll in the fall. You must already be enrolled in at least 12 units when accepted into the program. Contact office for application. |
## Support Programs - some examples

<table>
<thead>
<tr>
<th>Program</th>
<th>For Whom?</th>
<th>About the Program</th>
<th>Application Process</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Multicultural Center</strong></td>
<td>all students, regardless of background.</td>
<td>✓ Academic/personal counseling, general financial aid information.</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>✓ UC Personal Statement and Scholarship workshops.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>✓ Counselors work with students on enhancing time management strategies, improving study skills, and securing campus and community resources.</td>
<td></td>
</tr>
<tr>
<td><strong>Puente Project</strong></td>
<td>✓ Will enroll in ENGL 838 or 848</td>
<td>Links English and career classes in a one-year learning community that advances the Puente mission to increase the number of educationally underrepresented students who:</td>
<td>Complete interest form (download from website) now!</td>
</tr>
<tr>
<td></td>
<td>✓ Motivated to transfer</td>
<td>✓ Enroll in four-year universities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>✓ Interested in Latino Literature and experiences</td>
<td>✓ Earn college degrees</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>✓ Return to the community as leaders and mentors</td>
<td></td>
</tr>
<tr>
<td><strong>EOPS (Extended Opportunity Programs &amp; Services)</strong></td>
<td>✓ Low income have placed in a basic skills math or English course</td>
<td>✓ Providing access to higher education for individuals challenged by academic and socioeconomic barriers.</td>
<td>Apply in the fall: be enrolled with 12 units. See multi-step application process online and contact EOPS office for appointment.</td>
</tr>
</tbody>
</table>
# Support Programs - some examples

<table>
<thead>
<tr>
<th>San Jose City College</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Program</strong></td>
</tr>
<tr>
<td><strong>Umoja</strong></td>
</tr>
</tbody>
</table>
| **Puente Project** | ✓ Motivated to transfer  
✓ Interested in Latino Literature and experiences | Links English and career classes in a one-year learning community that advances the Puente mission to increase the number of educationally underrepresented students who:  
✓ Enroll in four-year universities  
✓ Earn college degrees  
✓ Return to the community as leaders and mentors | Complete interest form (download from website) now! |
| **EOPS** (Extended Opportunity Programs & Services) | ✓ Low income  
✓ have placed in a basic skills math or English course | ✓ Providing access to higher education for individuals challenged by academic and socioeconomic barriers. | Apply in the fall: be enrolled with 12 units. See multi-step application process online and contact EOPS office for appointment. |
TRIO Programs

- Federally funded student support organization
- Must be US citizen or permanent resident AND one of the following:
  - 1st generation college student, or
  - Low-income, or
  - Physically/Learning Disabled
- TRIO offers free services, such as
  - Tutoring with dedicated academic coaches
  - Academic counseling
  - Career planning
  - Visiting local 4-year universities
  - Transfer support
  - Mentoring
- Check the community college’s website for more information
Transfer Admission Guarantee (TAG)

- Six **UC campuses** offer guaranteed admission to California community college students who meet specific requirements:
  - Davis
  - Irvine
  - Merced
  - Riverside
  - Santa Barbara
  - Santa Cruz

This is a wonderful opportunity, so be sure to talk with a counselor about it in order to understand the process!
Transfer Admission Guarantee (TAG)

- You must begin the TAG program a year before you plan to transfer to a UC.
- Apply in September this year for admittance into TAG the following year.
- Even though you can’t do TAG until your 2nd year, be sure to start your Transfer Admission Planner as soon as you start community college.
- Meet with your counselor as soon as possible to talk about TAG, the requirements for each university and major, and the application process.
- Yes, successful completion of TAG is guaranteed transfer admission to a UC, however you will still need to complete the standard online UC application as well.
Honors Programs

• Cañada College Honors Transfer Program (CCHTP):
  • Supports highly motivated students as they pursue their educational goals of graduation and transfer.

• College of San Mateo Honors Project:
  • An interdisciplinary learning community where exceptional and exceptionally motivated students are provided with the coursework, support, and guidance to develop their academic and intellectual autonomy, collaborative abilities, and research skills. Participating in the Honors Project, you will both deepen your learning in your regular courses and achieve recognition that will help you with your transfer ambitions.

• Foothill College Honors Institute:
  • Specialized courses, special focus seminars, exposure to exciting cultural opportunities, and transfer scholarship opportunities.
There are many sports and clubs available at community colleges. Check the college’s website or visit the campus for more information.
Apply Online to Community Colleges

• One website where you can learn about any California community college:

http://home.cccapply.org/

Or go directly to the college’s website.
Apply to Texas Universities
### Checklist Task: ApplyTexas

**Purpose**
The purpose of this activity is to inform students about the steps needed to complete an application to a college or university in Texas.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Suggested Grade Level:</th>
</tr>
</thead>
<tbody>
<tr>
<td>The purpose of this activity is to inform students about the steps</td>
<td>12</td>
</tr>
<tr>
<td>needed to complete an application to a college or university in Texas.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Materials and Handouts</th>
<th>Approximate Time Needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="http://www.applytexas.org">www.applytexas.org</a></td>
<td>Varies</td>
</tr>
</tbody>
</table>

**Student-Facing Instructions**

2. Click on “Preview the 2016-2017 applications”.
3. Click on “U.S. Freshman Application”.
4. This will take you through an entire sample application.
5. Once you’re ready, go back to the home page, create a username and login and complete your actual application.

**Teacher Notes**
This lesson is specific to Texas colleges and universities. Refer to www.applytexas.org for any annual changes. You can also refer students to specific instructions for each section here: [https://www.applytexas.org/adappc/html/adm_help.html](https://www.applytexas.org/adappc/html/adm_help.html)

**Assessment**
Completion of application as verified by screenshot of submission page or email of submission confirmation.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
2. Click on “Preview the 2016-2017 applications”.
3. Click on “U.S. Freshman Application”.
4. This will take you through an entire sample application.
5. Once you’re ready, go back to the home page, create a username and login and complete your actual application.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Apply
to New York Universities
Checklist Task: ApplySUNY

Purpose
The purpose of this activity is to inform students about the steps needed to complete an application to a State University of New York.

Suggested Grade Level:
12

Materials and Handouts
www.suny.edu/applysuny/
http://www.suny.edu/attend/apply-to-suny/suny-online-academic-record-soar/

Student-Facing Instructions
1. Go to www.suny.edu/applysuny/
2. Click on “complete worksheet” under “Apply for Admission”.
3. You can download the entire application and fill it out by hand before filling it out electronically.
4. Once you’re ready, go back to the home page, create a username and login and complete your actual application.
5. When you’ve completed your online application, you will then fill out your SUNY Online Academic Record (SOAR), which is a self-report of your high school courses and grades:
   http://www.suny.edu/attend/apply-to-suny/suny-online-academic-record-soar/

Teacher Notes
This lesson is specific to the State Universities of New York. Refer to www.suny.edu/applysuny/ for any annual changes. You can also refer students to specific instructions for each section here: https://www.suny.edu/applysuny/pdf/suny_online_undergrad_app_instructions.pdf

Assessment
Completion of application as verified by screenshot of submission page or email of submission confirmation.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
1. Go to www.suny.edu/applysuny/
2. Click on “complete worksheet” under “Apply for Admission”.
3. You can download the entire application and fill it out by hand before filling it out electronically.
4. Once you’re ready, go back to the home page, create a username and login and complete your actual application.
5. When you’ve completed your online application, you will then fill out your SUNY Online Academic Record (SOAR), which is a self-report of your high school courses and grades: http://www.suny.edu/attend/apply-to-suny/suny-online-academic-record-soar/
SUNY Online Academic Record (SOAR)

SUNY gives students the opportunity to self-report their high school grades and courses, as well as their ACT and SAT test scores using the SUNY Online Academic Record (SOAR).

When you complete SOAR, your information is transmitted electronically and you receive...
# Checklist Task: Apply to CUNY

## Purpose
The purpose of this activity is to inform students about the steps needed to complete an application to a City University of New York.

## Materials and Handouts
- http://www.cuny.edu/admissions/undergraduate/prepare.html
- http://www.cuny.edu/admissions/apply.html

## Student-Facing Instructions
1. Before applying, prepare for your application by reading through: [http://www.cuny.edu/admissions/undergraduate/prepare.html](http://www.cuny.edu/admissions/undergraduate/prepare.html)
2. Once you’re ready, go to [http://www.cuny.edu/admissions/apply.html](http://www.cuny.edu/admissions/apply.html).
3. There are application tutorial videos and a downloadable application pdf for you to view and complete before filling out your application.
4. Once you’re ready, go back to the home page, create a username and login and complete your actual application.

## Teacher Notes
This lesson is specific to the City Universities of New York. Refer to [http://www.cuny.edu/admissions/apply.html](http://www.cuny.edu/admissions/apply.html) for any annual changes.

## Assessment
Completion of application as verified by screenshot of submission page or email of submission confirmation.

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
1. Before applying, prepare for your application by reading through:
   http://www.cuny.edu/admissions/undergraduate/prepare.html
2. Once you’re ready, go to http://www.cuny.edu/admissions/apply.html.
3. There are application tutorial videos and a downloadable application pdf for you to view and complete
   before filling out your application.
4. Once you’re ready, go back to the home page, create a username and login and complete your actual
   application.

---

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Apply to CUNY

Undergraduate Applicant

Graduate Applicant

Visiting Student

Continuing Education

Welcome >> Admissions >> Apply to CUNY

Apply to CUNY

Before you apply, visit cuny.edu/prepare to familiarize yourself with the application steps, admission review process and admission profiles. Be sure to download and complete the proper Application Worksheet before you begin the online Admission Application.

Once you have prepared, apply as a:

- **Freshman applicant** if you have not previously attended any college, university and/or proprietary school within or outside the United States since graduating from high school or secondary school.
- **Transfer applicant** if you have attended any college, university and/or proprietary school since graduating from high school/secondary school. This applies whether or not you are seeking transfer credit and/or changing a program of study.

**Online Application**

**Fall 2016 Admission**
The Fall 2016 Admission Application is now available. >>

**Spring 2016 Admission**
The Spring 2016 Admission Application is still available and we will continue to review applications on a space availability basis. >>

**Scheduled System Maintenance** - Please be advised that the CUNY Online Application (General Freshman, Macaulay Honors College, General Transfer and School of Professional Studies) is unavailable Monday through Thursday from 11pm to 2am and Friday from 11pm through 11am Saturday morning. We apologize for any inconvenience this may cause.

**Browser Compatibility**
Please be advised that you may experience difficulty in viewing the CUNY Admission Application in internet browsers other than Mozilla Firefox or Internet Explorer, such as Google Chrome and Safari.

I do not have a CUNY Portal Account
Register for an account >>

I have a CUNY Portal Account
Login and fill out an application >>
Prepare

Explore
Prepare
Prepare as a Freshman
Prepare as a Transfer
Deadlines & Notification Dates
Apply
After You Apply
Check Application Status
After You Are Admitted
Connect to CUNY

Each year, thousands of students from around the world come to New York City to study at the City University of New York. With unmatched opportunities, internationally renowned faculty and a supportive community, we are thrilled you have included CUNY in your college search. The first step towards applying is determining whether you are a Freshman or Transfer Applicant. Review the definitions below and follow the appropriate link to prepare.

FRESHMAN APPLICANTS
You are considered Freshman Applicant if you are currently in high school or have not previously attended any college, university and/or proprietary school within or outside the United States since graduating from high school or secondary school.

TRANSFER APPLICANTS
You are considered a Transfer applicant if you have attended any college, university and/or proprietary school since graduating from high school/secondary school. This applies whether or not you are seeking transfer credit and/or changing a program of study.
Theme: Transition to College Success
Complete Steps to Secure College Enrollment
Checklist Task: Steps to Secure College Enrollment

Purpose
The purpose of this lesson is to make sure students complete all steps to ensure enrollment in the college they plan to attend.

Suggested Grade Level:
12

Materials and Handouts
Check List to Secure College Enrollment

Approximate Time Needed:
Varies

Student-Facing Instructions
Fill out the appropriate college checklist to make sure you complete each step on time. Colleges have different deadlines, placement assessments, and other enrollment requirements. Certain majors may have additional requirements as well. Check your email correspondence from the college you’re planning to attend for specific information. Many colleges have an “After You’re Admitted” page, which you should also check for more information. Call the admissions office if you have questions.

Teacher Notes
This is California-specific, but can be tailored for other states. Colleges’ enrollment procedures and deadlines vary. Check that students understand the requirements for their intended college of attendance. All CSUs use EAP/ELM/EPT for placement testing. However, California community colleges, private and out-of-state colleges can all use different examinations for placement.

Assessment
Completion of checklist.

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco.
Instructions

Fill out the appropriate college checklist to make sure you complete each step on time. Colleges have different deadlines, placement assessments, and other enrollment requirements. Certain majors may have additional requirements as well. Check your email correspondence from the college you’re planning to attend for specific information. Many colleges have an “After You’re Admitted” page, which you should also check for more information. Call the admissions office if you have questions.
Colleges have different deadlines, placement assessments, and other enrollment requirements. Certain majors may have additional requirements as well. To gather this information:

- Check the website of the college you’re planning to attend. Many colleges have an “After You’re Admitted” page, which you should also check for more information.
- Check your email (including your SPAM folder) for correspondence from the college.
- Check your online portal.
- Call the admissions office if you have further questions.

Fill out the appropriate checklist below to make sure you complete each step on time. Be sure to add any additional steps that your college & major require!

### California Community College:

<table>
<thead>
<tr>
<th>To Do:</th>
<th>Date/Deadline</th>
<th>Notes</th>
<th>Done?</th>
<th>Where do I go...</th>
<th>Name of Office or Building</th>
</tr>
</thead>
<tbody>
<tr>
<td>Placement Test/Assessment</td>
<td></td>
<td></td>
<td></td>
<td>To take placement tests?</td>
<td></td>
</tr>
<tr>
<td>Tuition &amp; Fees Payment</td>
<td></td>
<td></td>
<td></td>
<td>To pay for my classes?</td>
<td></td>
</tr>
<tr>
<td>Register for Orientation</td>
<td></td>
<td></td>
<td></td>
<td>For financial aid questions and info?</td>
<td></td>
</tr>
<tr>
<td>Meet with My Counselor</td>
<td></td>
<td></td>
<td></td>
<td>For Orientation?</td>
<td></td>
</tr>
<tr>
<td>Register for Classes</td>
<td>To meet with my counselor?</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>----------------------</td>
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<td></td>
</tr>
<tr>
<td>Drop/Add a Class</td>
<td>To register for and Drop/Add my classes?</td>
<td></td>
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</tr>
</tbody>
</table>

**California State University:**

<table>
<thead>
<tr>
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<th>Done?</th>
<th>Where do I go...</th>
<th>Name of Office or Building</th>
</tr>
</thead>
<tbody>
<tr>
<td>Statement of Intent to Register (SIR) Submitted</td>
<td>May 1st</td>
<td></td>
<td></td>
<td>To take placement tests?</td>
<td></td>
</tr>
<tr>
<td>Placement Testing: EAP/ELM/EPT</td>
<td></td>
<td></td>
<td></td>
<td>To pay for my classes?</td>
<td></td>
</tr>
<tr>
<td>Registered for Early Start Program</td>
<td></td>
<td></td>
<td></td>
<td>For financial aid questions and info?</td>
<td></td>
</tr>
<tr>
<td>SAT/ACT Scores Submitted</td>
<td>Final Transcript Sent</td>
<td>Tuition &amp; Fees Payment</td>
<td>Housing/ Dorm Secured</td>
<td>Register for Orientation</td>
<td>Register for Classes</td>
</tr>
<tr>
<td>-------------------------</td>
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<td>-------------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>For Orientation?</td>
<td>To meet with my counselor?</td>
<td>To register for and Drop/Add my classes?</td>
<td>For dorm information?</td>
<td>For EOP information?</td>
<td>To get a parking permit?</td>
</tr>
</tbody>
</table>


<table>
<thead>
<tr>
<th>To Do:</th>
<th>Date/Deadline</th>
<th>Notes</th>
<th>Done?</th>
<th>Where do I go...</th>
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<td></td>
</tr>
<tr>
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<td></td>
<td></td>
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<td></td>
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<td></td>
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<td>To register for and Drop/Add my classes?</td>
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<td></td>
<td></td>
<td>For dorm information?</td>
<td></td>
</tr>
<tr>
<td>Register for Classes</td>
<td></td>
<td></td>
<td></td>
<td>To get a parking</td>
<td></td>
</tr>
<tr>
<td>Drop/Add a Class</td>
<td>Date/Deadline</td>
<td>Notes</td>
<td>Done?</td>
<td>Where do I go...</td>
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<td></td>
</tr>
</tbody>
</table>
Prepare For
the Rigor Culture
of College
Finishing Strong: How College is Different

Purpose
The purpose of this activity is for students to think critically about how college is different from their previous educational experiences.

Suggested Grade Level:
12

Approximate Time Needed:
50 minutes

Materials and Handouts

How is College Different
What’s the Difference

Student-Facing Instructions

Write down all the ways that you think college will be different than high school on the handout, “What’s the Difference?” Then turn to a partner and compare your lists and create a joint list. Join with another pair and create a joint list for the four of you. Discuss lists with the class. Submit this list for the assignment.

Look at the handout, “How is College Different?”. While still in your group of 4, review your assigned category and compare it to the class-generated list. Highlight 2 or 3 items from the handout that were not on the class list and be prepared to share with the class.

Also think about the colleges you visited and students/admissions representatives you spoke with. How can individual colleges be different from each other in the categories you discussed?

Assessment
Completion of worksheet
Instructions

Write down all the ways that you think college will be different than high school on the handout, “What’s the Difference? Then turn to a partner and compare your lists and create a joint list. Join with another pair and create a joint list for the four of you. Discuss lists with the class. Submit this list for the assignment.

Look at the handout, “How is College Different”. While still in your group of 4, review your assigned category and compare it to the class-generated list. Highlight 2 or 3 items from the handout that were not on the class list and be prepared to share with the class.

Also think about the colleges you visited and students/admissions representatives you spoke with. How can individual colleges be different from each other in the categories you discussed?
## How Is College Different From High School?

<table>
<thead>
<tr>
<th>Following the Rules in High School</th>
<th>Choosing Responsibly in College</th>
</tr>
</thead>
<tbody>
<tr>
<td>High school is <em>mandatory</em> and usually <em>free.</em></td>
<td>College is <em>voluntary</em> and <em>expensive.</em></td>
</tr>
<tr>
<td>Your time is structured by others.</td>
<td>You manage your own time.</td>
</tr>
<tr>
<td>You need permission to participate in extracurricular activities</td>
<td>You must decide whether to participate in co-curricular activities.</td>
</tr>
<tr>
<td>You can count on parents and teachers to remind you of your responsibilities and to guide you in setting priorities.</td>
<td><em>You</em> must balance your responsibilities and set priorities. You will face moral and ethical decisions you have never faced before.</td>
</tr>
<tr>
<td>Each day you proceed from one class directly to another, spending 6 hours each day--30 hours a week--in class.</td>
<td>You often have hours between classes; class times vary throughout the day and evening and you spend only 12 to 16 hours each week in class.</td>
</tr>
<tr>
<td>Most of your classes are arranged for you.</td>
<td>You arrange your own schedule in consultation with your adviser. Schedules tend to look lighter than they really are.</td>
</tr>
<tr>
<td>You are not responsible for knowing what it takes to graduate.</td>
<td>Graduation requirements are complex, and differ from year to year. You are expected to know those that apply to you.</td>
</tr>
<tr>
<td><em>Guiding principle: You will usually be told what to do and corrected if your behavior is out of line.</em></td>
<td><em>Guiding principle: You are expected to take responsibility for what you do and don't do, as well as for the consequences of your decisions.</em></td>
</tr>
</tbody>
</table>

### Going to High School Classes

- The school year is 36 weeks long; some classes extend over both semesters and some don't.
- Classes generally have no more than 35 students.
- You may study outside class as little as 0 to 2 hours a week, and this may be mostly last-minute test preparation.

### Succeeding in College Classes

- The academic year is typically divided into two separate 15-week semesters, plus a week after each semester for exams.
- Classes may number 100 students or more.
- You need to study at least 2 to 3 hours outside of class for each hour in class.
<table>
<thead>
<tr>
<th>You seldom need to read anything more than once, and sometimes listening in class is enough.</th>
<th>You need to review class notes and text material regularly.</th>
</tr>
</thead>
<tbody>
<tr>
<td>You are expected to read short assignments that are then discussed, and often re-taught, in class.</td>
<td>You are assigned substantial amounts of reading and writing which may not be directly addressed in class.</td>
</tr>
<tr>
<td>* Guiding principle: You will usually be told in class what you need to learn from assigned readings.</td>
<td>* Guiding principle: It's up to you to read and understand the assigned material; lectures and assignments proceed from the assumption that you’ve done so.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>HIGH SCHOOL TEACHERS</strong></th>
<th><strong>COLLEGE PROFESSORS</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Teachers check your completed homework.</td>
<td>Professors may not always check completed homework, but they will assume you can perform the same tasks on tests.</td>
</tr>
<tr>
<td>Teachers remind you of your incomplete work.</td>
<td>Professors may not remind you of incomplete work.</td>
</tr>
<tr>
<td>Teachers approach you if they believe you need assistance.</td>
<td>Professors are usually open and helpful, but most expect you to initiate contact if you need assistance.</td>
</tr>
<tr>
<td>Teachers are often available for conversation before, during, or after class.</td>
<td>Professors expect and want you to attend their scheduled office hours.</td>
</tr>
<tr>
<td>Teachers have been trained in teaching methods to assist in imparting knowledge to students.</td>
<td>Professors have been trained as experts in their particular areas of research.</td>
</tr>
<tr>
<td>Teachers provide you with information you missed when you were absent.</td>
<td>Professors expect you to get from classmates any notes from classes you missed.</td>
</tr>
<tr>
<td>Teachers present material to help you understand the material in the textbook.</td>
<td>Professors may not follow the textbook. Instead, to help explain the text, they may give illustrations, provide background information, or discuss research about the topic you are studying. Or they may expect you to relate the classes to the textbook readings.</td>
</tr>
<tr>
<td>Teachers often write information on the board to be copied in your notes.</td>
<td>Professors may lecture nonstop, expecting you to identify the important points in your notes. When professors write on the board, it may be to illustrate a point, not to summarize it. Good notes are a must.</td>
</tr>
<tr>
<td></td>
<td>Teachers impart knowledge and facts, sometimes drawing direct connections and leading you through the thinking process.</td>
</tr>
<tr>
<td>-------</td>
<td>-----------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Teachers often take time to remind you of assignments and due dates.</td>
</tr>
<tr>
<td></td>
<td>Teachers carefully monitor class attendance.</td>
</tr>
<tr>
<td></td>
<td>* Guiding principle: High school is a teaching environment in which you acquire facts and skills.</td>
</tr>
<tr>
<td></td>
<td><strong>TESTS IN HIGH SCHOOL</strong></td>
</tr>
<tr>
<td></td>
<td>Testing is frequent and covers small amounts of material.</td>
</tr>
<tr>
<td></td>
<td>Makeup tests are often available.</td>
</tr>
<tr>
<td></td>
<td>Teachers frequently rearrange test dates to avoid conflict with school events.</td>
</tr>
<tr>
<td></td>
<td>Teachers frequently conduct review sessions, pointing out the most important concepts.</td>
</tr>
<tr>
<td></td>
<td>* Guiding principle: Mastery is usually seen as the ability to reproduce what you were taught in the form in which it was presented to you, or to solve the kinds of problems you were shown how to solve.</td>
</tr>
<tr>
<td><strong>GRADES IN HIGH SCHOOL</strong></td>
<td><strong>GRADES IN COLLEGE</strong></td>
</tr>
<tr>
<td>--------------------------</td>
<td>----------------------</td>
</tr>
<tr>
<td>Grades are given for most assigned work.</td>
<td>Grades may not be provided for all assigned work.</td>
</tr>
<tr>
<td>Consistently good homework grades may raise your overall grade when test grades are low.</td>
<td>Grades on tests and major papers usually provide most of the course grade.</td>
</tr>
<tr>
<td>Extra credit projects are often available to help you raise your grade.</td>
<td>Extra credit projects cannot, generally speaking, be used to raise a grade in a college course.</td>
</tr>
<tr>
<td>Initial test grades, especially when they are low, may not have an adverse effect on your final grade.</td>
<td>Watch out for your <em>first</em> tests. These are usually &quot;wake-up calls&quot; to let you know what is expected--but they also may account for a substantial part of your course grade. You may be shocked when you get your grades.</td>
</tr>
<tr>
<td>You may graduate as long as you have passed all required courses with a grade of D or higher.</td>
<td>You may graduate only if your average in classes meets the departmental standard--typically a 2.0 or C.</td>
</tr>
<tr>
<td>* Guiding principle: <em>Effort counts.</em> Courses are usually structured to reward a &quot;good-faith effort.&quot;</td>
<td>* Guiding principle: <em>Results count.</em> Though &quot;good-faith effort&quot; is important in regard to the professor's willingness to help you achieve good results, it will not substitute for results in the grading process.</td>
</tr>
</tbody>
</table>
What’s the Difference?

Write down all the ways you think college will be different from high school.
### Purpose

The purpose of this activity is for students to understand how to appropriately choose college courses and prepare for their Transition Plan Oral Defense.

<table>
<thead>
<tr>
<th>Suggested Grade Level:</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
</tr>
</tbody>
</table>

### Materials and Handouts

- Benefits of Orientation
- Planning First Term Schedule
- How to Make the Transition to College

<table>
<thead>
<tr>
<th>Approximate Time Needed:</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 minutes</td>
</tr>
</tbody>
</table>

### Student-Facing Instructions

Review the handout the handouts for this assignment. You will be planning your first term. Using the college your were accepted to, a community college, or a college you would like to apply to in the future, look at the course catalogue and take into account the tips outlined in the handouts.

Submit your first term schedule.

### Assessment

Completion of First Term Schedule

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Adapted from the College Readiness: Finishing Strong Workshop
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Instructions

Review the handout the handouts for this assignment. You will be planning your first term. Using the college your were accepted to, a community college, or a college you would like to apply to in the future, look at the course catalogue and take into account the tips outlined in the handouts.

Submit your first term schedule.
Benefits of Attending Freshmen Orientation

Going to college can be exhilarating yet frightening at the same time. You may be nervous about meeting new people or finding your way around campus. How are you going to make new friends? What if you can't maneuver your way around your college's library? Don't worry; you're not the only entering freshman who has worried about these issues. At some point, every new freshman has wondered how he will adapt to his new life at college.

To make the transition from high school to college a little bit easier, most colleges have freshmen orientation. This is when students can meet other classmates, learn about campus life, and ask any questions they may have before the semester starts. Many colleges require entering freshmen to attend orientation, but if you are going to a college where it is not required, you may be wondering if attending orientation will be a waste of time. Before you make the decision not to go, consider the following points on why freshmen orientation will be beneficial to you.

**You can make friends before the semester starts.**
By attending orientation, you will have the opportunity to meet other incoming freshmen and hopefully make new friends. This will help you to not feel so alone and scared once you start in the fall. Attending orientation may also provide an opportunity for you to meet someone with whom you would like to room.

**You will know your way around the campus by fall semester.**
Orientation leaders will show you around campus while providing history about the college. They will tell you the locations of the favorite hangout spots, where to go when you need medical care, and what the nicknames are for certain buildings or areas. Come fall semester, you will know where to go when someone says, "Meet me at the UC."

**You will know about various campus activities.**
During orientation, you will attend several meetings/lectures about college life. Have you thought about joining a sorority or fraternity? If you go to orientation, you will be able to acquire the information you need in order to make a decision about whether or not to rush. Want to join a campus club? Some colleges provide meetings at orientation that give information on various campus clubs.
You will receive help with class registration.
At many college orientations, freshmen will be assigned an advisor to help them figure out what classes to take their first semester. Often times, freshmen are shown how to register for classes because it can be confusing if you have never done it before. Keep in mind that the earlier you attend orientation and register for classes, the better chance you have of getting the courses you want before they fill up.

You can sit in on college classes.
Usually, students will have a break during the orientation to check out the campus on their own. You can take this opportunity to attend a large lecture class so you will know what to expect in the fall. Most colleges have summer classes, so if your orientation is in July, you can still attend a college lecture.

You can experience dorm life.
Orientations usually last between two to three days, so you will spend the night(s) in a dorm room while there. If you will be living on campus in the fall, this will give you an idea of how many personal items you should bring with you. If you will not be living on campus, this will give you the experience of what it’s like to live in a dorm.

You can take care of any unfinished business.
At most orientations, you will have the opportunity to talk to people about financial aid, housing, and meal plans. Ask these people questions if you have any concerns regarding your future at that college. In addition to asking questions, you will have the chance to get your student ID card made. This is one less thing you will have to do come fall semester.

Freshmen orientation is a process that makes incoming students feel better prepared about going to college. Not only will you have the opportunity to make new friends, but you will also learn about various campus activities before the fall semester even starts. Instead of skipping orientation, use this opportunity to become familiar with the environment you will be living in for the next four or more years of your life.

(from: www.ecampustours.com/campuslife/yourfreshmanyear/planningyourfirsttermcollegeschedule)
Planning your First-Term College Schedule

Going to college can be an exciting, yet confusing time for many entering freshmen. From finding your way around campus to being away from home for the first time, it's no wonder that you may feel overwhelmed. One of the most crucial tasks that you will be faced with is the creation of your first-term college schedule. Consider the following to help you map out a schedule that is most conducive to your specific needs.

General College Requirements
Since general college requirements precede and support more specialized classes, you really need to take some general requirements during your first semester. General requirements usually include: foreign language, math, English, science, history, etc. If you have taken AP courses or performed well on placement tests, then you may be able to opt out of some core requirements, depending on your particular school.

Course Selection
When planning your first-term college schedule, it is a good idea to balance the types of courses you are taking. Don't only take classes that require a lot of reading and writing; try to balance those classes with courses in math, foreign language, or art. Likewise, don't take two lab science courses and two math classes. You would be too overwhelmed. By having a mixture of courses that include reading, writing, problem solving, etc., you will have a balanced schedule that will give you a variety of assignments so you won't be weighed down with the same tasks.

Course Load
To be considered a full-time student, you must be enrolled in a minimum number of credit hours. However, if you only take the minimum credit hours each semester, you may also have to take summer classes to be able to graduate on time in four years. With that said, try to balance your first-term schedule so you are not too overwhelmed. If you are working part-time and going to school at the same time, consider taking the minimum credit hours during your first semester. After you get used to college courses, then you can take more credit hours. If you do not plan on working during your first-term, then you should be able to handle more credit hours.

Time of Day
In college, you have a very flexible schedule. Since you will not be in classes for seven hours every day like you were in high school, you can pick the times and even the days of the week that you want to attend class. If you have a job where you need to work evenings, you can schedule your classes for the mornings and vice versa. If you are just not a morning person, then you can schedule your classes for the afternoons (just keep in mind that there may be more distractions for you to skip afternoon or evening classes). Furthermore, if you only want to go to classes a few days a week, you can plan your schedule so that you only have classes on Monday/Wednesday/Friday or Tuesday/Thursday.
Classroom Location
When planning your first-term college schedule, you need to be aware of the geographical locations of the classrooms. You need to allow enough time to get from one location to another without being late to class. If you have a class that ends at 9:50am, you wouldn't have time to walk to a 10am class that is almost a mile away. Many larger campuses offer shuttles, so be sure to get your campus bus schedule before you plan your schedule. You should also get a campus map (most are located on the back of time tables) to help you figure out where your classes are located.

Planning a college schedule can be daunting if you have never done it before. If you go to your school's Freshmen Orientation, you will be assigned an advisor who can help you plan out your first-term schedule. Go to your advisor meeting prepared with a list of courses that you would like to take, as well as alternatives since you may not get into your first picks.

(from www.ecampustours.com/campuslife/yourfreshmanyear/planningyourfirsttermcollegeschedule)
How to Make the Transition to College

- Take control of your own education -- think of yourself as a scholar.
- Get to know your professors -- they are your single greatest resource.
- Be assertive -- create your own support systems, and seek help when you realize you may need it.
- Take advantage of the college’s support services program (for tutoring support) -- enroll in the school’s writing assistance program.
- Take control of your time -- plan ahead to satisfy academic obligations and make room for everything else.
- Stretch yourself -- enroll in at least one course that really challenges you.
- Make thoughtful decisions -- don't take a course just to satisfy a requirement, and don't drop any course too quickly.
- Think beyond the moment -- set goals for the semester, the year, your college career.

from SMU’s Altshuler Learning Enhancement Center (A-LEC) program.
Prepare For the Costs of College
Budgeting 103, Part 1: Life Skills - Identifying Your Expenses

Purpose

The purpose of this lesson is for students to recap budgeting concepts and types of expenses.

Suggested Grade Level:

12

Materials and Handouts

Life Skills Identifying Your Expenses

Approximate Time Needed:

15 minutes

Student-Facing Instructions

Complete the handout individually and then share your responses with the small group.

Teacher Notes

This lesson is 1st in a 3-lesson series called Budgeting 103.

BREAKOUT 1: RECAP AND FAMILY FEUD (15 minutes)
MATERIALS NEEDED: Whiteboard/chart paper, markers

MENTOR:
Do a small group introduction, if appropriate.
RECAP: Students share key takeaways and homework completed from the previous workshop.
FAMILY FEUD: Ensure students come up with an appropriate team name.
TRAINER TIP: While students are talking, prepare for “Family Feud” by writing the numbers 1-6 vertically on the white board/chart paper.

TRAINER: Issue a one minute time check. Call the class together and have each group share their name. Record the team names on the whiteboard or chart paper. Present the directions to the class – the game takes approximately 8-10 minutes to complete:

- This game reviews expenses commonly associated with college and builds on the knowledge students have gained from the previous budget workshops. This game is loosely based on the game show “Family Feud.”

Adapted from the GLOW Foundation Financial Literacy curriculum.
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Teacher Resource

Feud” where each team competes against one another to secure the most points. 100 people were polled and the top six answers will be written on the board as they are called. The question asked was: What is typically included in the term “Cost of Attendance?

- To get the game started, the Trainer will momentarily call out a type of expense. The first group to correctly categorize that expense (i.e. fixed, flexible, or discretionary) will “play” first. On their turn, the team has 10 seconds to come up with an answer to the question.

For a correct response: Trainer logs the response on the board next to the appropriate top answer. The point value of the response (recorded in parentheses) is logged under the appropriate team's name. Play passes to the next team.

For an incorrect response: Trainer draws a large “X” on the board. A total of three wrong guesses from the class (regardless of which team called it out) will end the game. Play passes to the next team.

Each team provides only one guess on their turn – regardless of the response given, play always passes to the next team. The game ends when all top answers are guessed OR three strikes (or incorrect answers) are logged. The team with the most points at the end of the game wins. If the game ends because of the strike count, share the remaining answers with the class.

MENTOR TIP: Encourage group members to participate – if you have not viewed the answers, you can play too. If you have taken a look at the responses below, refrain from giving your group any additional clues.

TO DETERMINE WHO GOES FIRST: Gasoline (flexible)
TOP SIX ANSWERS (IN THIS ORDER):
1. Tuition and Fees (45): Money charged by a college or university to cover instructional costs. Fees could include student association, lab, or application costs.
2. Books and Supplies (20): Textbooks and other school supplies including a computer or printer.
3. Room (10): Student’s housing situation which can include living on campus in dorms, off-campus, or at home.
4. Board (8): Meal or dining plan
5. Transportation (6): Any costs related to transportation including bus/train passes, vehicle costs (includes vehicle payments, gas, maintenance, car insurance), parking permits, or airline tickets.
6. Personal (3): Can include toiletries, haircuts, personal shopping, and entertainment.

Students will spend the remaining time (approximately 5 minutes) completing the “Life Skills – Identifying Your Expenses” handout in their small groups.

MENTOR:
Ensure students complete and discuss the handout as a quick review. Bear in mind that students may not categorize their expenses in the same way based on their individual spending.

TRAINER: Issue a one minute time check.

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**LIFE SKILLS – IDENTIFYING YOUR EXPENSES**  
(Answer Key)

**Directions:** Complete the handout individually and then share your responses with the small group.

1. **What is a budget and what is the purpose of creating one?**

   A budget is a tool that helps you manage your current finances (both expenses and income) and proactively plan for the future. It allows you to see how much money you have, what you spend it on, and plan so that you allocate those funds in the best way possible. Budgeting can help you reach your financial goals and identify unnecessary spending.

2. **Define each type of expense. Complete the table by recording the expenses you currently have as a high school student and what you expect to cover as a college student and college graduate.** You can use your handouts from the previous workshops or the cost of attendance information you brought to fill in the table.

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Definition</th>
<th>High School Expenses</th>
<th>College Expenses</th>
<th>Post-College Expenses</th>
</tr>
</thead>
</table>
| Fixed        | A necessary expense that stays at a fixed rate | • Cell Phone Bill | • Tuition  
• Cell Phone Bill | • Rent  
• Cell Phone Bill  
• Health Insurance  
• Car Insurance  
• Parking Permit  
• Loan Payments |
| Flexible     | A necessary expense that can fluctuate in cost; you have some control over how much you want to spend | • Public Transportation  
• Haircuts | • Books and Supplies  
• Computer  
• Room and Board  
• Furniture/Appliances  
• Groceries  
• Public Transportation  
• Toiletries  
• Haircuts  
• Laundry | • Utility Bills  
• Furniture  
• Groceries  
• Gas  
• Car Maintenance  
• Toiletries  
• Haircuts  
• Laundry |
| Discretionary| An unnecessary expense; “fun money” | • Dining Out  
• Clothes/Shoes  
• Movies  
• Gifts  
• Savings | • Dining Out  
• Airline Tickets  
• Clothes/Shoes  
• Movies/Concerts  
• Gifts  
• Savings | • Dining Out  
• Clothes/Shoes  
• Movies/Concerts  
• Trips  
• Gifts/Donations  
• Savings |
Complete the handout individually and then share your responses with the small group.
LIFE SKILLS – IDENTIFYING YOUR EXPENSES

**Directions:** Complete the handout individually and then share your responses with the small group.

1. **What is a budget and what is the purpose of creating one?**

2. **Define each type of expense.** Complete the table by recording the expenses you currently have as a high school student and what you expect to cover as a college student and college graduate. You can use your handouts from the previous workshops or the cost of attendance information you brought to fill in the table.

<table>
<thead>
<tr>
<th>Expense Type</th>
<th>Definition</th>
<th>High School Expenses</th>
<th>College Expenses</th>
<th>Post-College Expenses</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Flexible</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Discretionary</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Purpose

The purpose of this lesson is for students to identify their current and future expenses as a college student and to craft a simple college budget factoring in their college and living costs.

Suggested Grade Level:

12

Materials and Handouts

College Budget
College Costs

Approximate Time Needed:

30 minutes

Student-Facing Instructions

Create a personal budget taking into account your college choice and current spending habits. Use your COA information to supplement this budget but personalize it where you can (especially with regard to the transportation, personal, and other categories). In some categories, you may select multiple options. Total your costs in the right-hand column.

The College Costs handout outlines the cost of attendance by type of college (2014-15) in Northern California. Compare the different college costs.

Teacher Notes

BREAKOUT 2: COLLEGE BUDGET SCENARIO (30 minutes)

TRAINER: Provide directions for “Breakout 2.”
Students have 20 minutes to complete their “College Budget” handout. Students will use a combination of their pre-work (print out of the cost of attendance (COA) information) and knowledge about their personal spending habits to complete the table. Note: Sample COA information is provided in the student handouts for those who did not complete the pre-work.

Adapted from the GLOW Foundation Financial Literacy curriculum.
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Provide an overview of the handout, highlighting the following:

- Expense Categories
- Sections where students can select multiple options (i.e. food, transportation, etc.)
- Sections where students can personalize their budget based on information they know now (i.e. cell phone bill, dining out, public transit, personal care, savings, etc.)
- “Cost per Academic Year” column where students total their costs

Students will spend the remaining time (approximately 10 minutes) debriefing with their small group.

MENTOR: Work with your small group to clarify questions or help students think through their budget. This thought exercise is designed to get them looking ahead and thinking about how their personal and financial situation will change once they graduate high school.

TRAINER: Issue a time check when 10 minutes remain and instruct Mentors to begin debriefing with their small group. If no Mentors are present, call the class together to reflect on the exercise.

MENTOR: Use the following questions or your own to debrief:

- What was most helpful/most challenging about this breakout?
- In what ways could you better track your spending to create a more accurate budget? – Encourage students to name specific strategies to track their finances
- How did you augment the cost of attendance information to make it relevant to your personal situation?
- What resources are available to you to help you pay for these college costs?

Funding Options

Scholarships: Free money that pays for college-related expenses. Can be awarded based on a variety of criteria which varies by scholarship agency.

Grants: Free money that covers your college expenses; awards are based on financial need.

Work Study: Money that is earned from a part-time job on or off campus; based on financial need.

Loans: Borrowed money that is repaid with interest. Prioritize federal loans over private loans as they offer fixed interest rates and more flexible repayment schedules.

TRAINER: Issue a two minute time check. Call the class together and lead a 1-2 minute debrief.
Instructions

Create a personal budget taking into account your college choice and current spending habits. Use your COA information to supplement this budget but personalize it where you can (especially with regard to the transportation, personal, and other categories). In some categories, you may select multiple options. Total your costs in the right-hand column.

The College Costs handout outlines the cost of attendance by type of college (2014-15) in Northern California. Compare the different college costs.
COLLEGE BUDGET

Directions: Create a personal budget taking into account your college choice and current spending habits. Use your COA information to supplement this budget but personalize it where you can (especially with regard to the transportation, personal, and other categories). In some categories, you may select multiple options. Total your costs in the right-hand column.

<table>
<thead>
<tr>
<th>EXPENSE CATEGORY</th>
<th>COST PER ACADEMIC YEAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>EDUCATION</td>
<td></td>
</tr>
<tr>
<td>TUITION AND FEES</td>
<td>$</td>
</tr>
<tr>
<td>BOOKS AND SUPPLIES</td>
<td>$</td>
</tr>
<tr>
<td>HOUSING AND UTILITIES/BILLS</td>
<td>$</td>
</tr>
<tr>
<td>HOUSING - SELECT ONE:</td>
<td></td>
</tr>
<tr>
<td>Housing: On campus</td>
<td></td>
</tr>
<tr>
<td>Housing: Off campus</td>
<td></td>
</tr>
<tr>
<td>Housing: At home</td>
<td></td>
</tr>
<tr>
<td>UTILITIES: Electricity, water, cable, internet (included if living on-campus)</td>
<td>$</td>
</tr>
<tr>
<td>PHONE SERVICES: Phone + Service</td>
<td>$</td>
</tr>
<tr>
<td>FOOD/DINING</td>
<td>$</td>
</tr>
<tr>
<td>FOOD – SELECT ALL THAT APPLY</td>
<td></td>
</tr>
<tr>
<td>Meal Plan: $</td>
<td></td>
</tr>
<tr>
<td>Groceries: $</td>
<td></td>
</tr>
<tr>
<td>Dining Out: $</td>
<td></td>
</tr>
<tr>
<td>TRANSPORTATION</td>
<td>$</td>
</tr>
<tr>
<td>TRANSPORTATION – SELECT ALL THAT APPLY</td>
<td></td>
</tr>
<tr>
<td>Public Transportation: $</td>
<td></td>
</tr>
<tr>
<td>Vehicle Payments: $</td>
<td></td>
</tr>
<tr>
<td>Gas: $</td>
<td></td>
</tr>
<tr>
<td>Maintenance: $</td>
<td></td>
</tr>
<tr>
<td>Car Insurance: $</td>
<td></td>
</tr>
<tr>
<td>Parking Permit: $</td>
<td></td>
</tr>
<tr>
<td>Airline Tickets: $</td>
<td></td>
</tr>
<tr>
<td>HEALTH INSURANCE</td>
<td>$</td>
</tr>
<tr>
<td>HEALTH INSURANCE – SELECT ALL THAT APPLY</td>
<td>$</td>
</tr>
<tr>
<td>Medical/Vision/Dental: $</td>
<td></td>
</tr>
<tr>
<td>Prescriptions/Medication: $</td>
<td></td>
</tr>
<tr>
<td>PERSONAL</td>
<td>$</td>
</tr>
<tr>
<td>PERSONAL CARE (include toiletries, haircuts, personal shopping)</td>
<td>$</td>
</tr>
<tr>
<td>ENTERTAINMENT/RECREATION (include hobbies, going out)</td>
<td>$</td>
</tr>
<tr>
<td>OTHER</td>
<td>$</td>
</tr>
<tr>
<td>DONATIONS, GIFTS, AND SAVING – SELECT ALL THAT APPLY</td>
<td>$</td>
</tr>
<tr>
<td>Donations: $</td>
<td></td>
</tr>
<tr>
<td>Gifts: $</td>
<td></td>
</tr>
<tr>
<td>Savings: $</td>
<td></td>
</tr>
<tr>
<td>TOTAL: $</td>
<td>$</td>
</tr>
</tbody>
</table>
## COLLEGE COSTS

### COST OF ATTENDANCE BY TYPE OF COLLEGE (2014-15) – NORTHERN CALIFORNIA

<table>
<thead>
<tr>
<th>School</th>
<th>Tuition/ Fees</th>
<th>Book and Supplies</th>
<th>Room/ Board*</th>
<th>Health Insurance</th>
<th>Transportation</th>
<th>Personal</th>
<th>Total Cost of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community College: Foothill College**</td>
<td>$1,500</td>
<td>$1,746</td>
<td>$11,646</td>
<td>n/a</td>
<td>$1,278</td>
<td>3,132</td>
<td>$19,302</td>
</tr>
<tr>
<td>SF State University (In-State Resident)</td>
<td>$6,468</td>
<td>$1,826</td>
<td>$13,052</td>
<td>n/a</td>
<td>$1,496</td>
<td>$1,364</td>
<td>$24,206</td>
</tr>
<tr>
<td>SF State University (Out-of-State Resident)***</td>
<td>$15,396</td>
<td>$1,826</td>
<td>$13,052</td>
<td>n/a</td>
<td>$1,496</td>
<td>$1,364</td>
<td>$32,756</td>
</tr>
<tr>
<td>UC Santa Cruz (In-State Resident)</td>
<td>$13,398</td>
<td>$1,440</td>
<td>$14,730</td>
<td>$2,415</td>
<td>$573</td>
<td>$1,800</td>
<td>$34,356</td>
</tr>
<tr>
<td>UC Santa Cruz (Out-of-State Resident)</td>
<td>$36,276</td>
<td>$1,440</td>
<td>$14,730</td>
<td>$2,415</td>
<td>$573</td>
<td>$1,800</td>
<td>$57,234</td>
</tr>
<tr>
<td>Santa Clara University (Private)</td>
<td>$43,812</td>
<td>$1,746</td>
<td>$12,921</td>
<td>n/a</td>
<td>$864</td>
<td>$2,295</td>
<td>$61,638</td>
</tr>
</tbody>
</table>

* Assumes students are living on campus for four-year schools and near campus for community colleges. Students are not living at home and commuting.
** Non-residents are charged an additional $144.00 per unit per quarter.
*** Assumes students are taking 12 units/semester at an additional $372 per unit plus the in-state tuition and fee rates.

## COST OF ATTENDANCE FOR CALIFORNIA RESIDENTS (2014-15) – SOUTHERN CALIFORNIA

<table>
<thead>
<tr>
<th>Type of School</th>
<th>Tuition/ Fees</th>
<th>Book and Supplies</th>
<th>Room/ Board*</th>
<th>Health Insurance</th>
<th>Transportation</th>
<th>Personal/ Misc.</th>
<th>Total Cost of Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community College: East Los Angeles College (2013-14)</td>
<td>$1,220</td>
<td>$1,710</td>
<td>$11,268</td>
<td>n/a</td>
<td>$1,323</td>
<td>$2,844</td>
<td>$18,365</td>
</tr>
<tr>
<td>Cal State L.A. (In-State Resident)</td>
<td>$6,343</td>
<td>$1,809</td>
<td>$12,627</td>
<td>n/a</td>
<td>$1,389</td>
<td>$1,365</td>
<td>$23,533</td>
</tr>
<tr>
<td>Cal State L.A. (Out-of-State Resident)</td>
<td>$15,271</td>
<td>$1,809</td>
<td>$12,627</td>
<td>n/a</td>
<td>$1,389</td>
<td>$1,365</td>
<td>$32,461</td>
</tr>
<tr>
<td>UCLA (In-State Resident)</td>
<td>$12,862</td>
<td>$1,599</td>
<td>$14,571</td>
<td>$1,938</td>
<td>$585</td>
<td>$1,638</td>
<td>$33,193</td>
</tr>
<tr>
<td>UCLA (Out-of-State Resident)</td>
<td>$35,740</td>
<td>$1,599</td>
<td>$14,571</td>
<td>$1,938</td>
<td>$585</td>
<td>$1,638</td>
<td>$56,071</td>
</tr>
<tr>
<td>University of Southern California (Private)**</td>
<td>$48,347</td>
<td>$1,500</td>
<td>$13,334</td>
<td>n/a</td>
<td>$580</td>
<td>$1,000</td>
<td>$64,761</td>
</tr>
</tbody>
</table>

*Assumes students are living on campus for four-year schools and near campus for community colleges. Students are not living at home and commuting.
Budgeting 103, Part 3: Student Reflection

Purpose
In this lesson, students reflect upon their current and future expenses as a college student.

Suggested Grade Level:
12

Materials and Handouts
Student Reflections

Approximate Time Needed:
5 minutes

Student-Facing Instructions
Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a one-page reflection in which you address the following questions:
- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- What knowledge can you pass on or share with family members?
- What next steps can you take based on what you learned?

Teacher Notes
This lesson is 3rd in a 3-lesson series called Budgeting 103.

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Formative Assessment
Experience/Understanding reflection aligned to quality criteria:

Student Learning Outcomes assessed in this task:
- Review prior learning for a broader perspective about educational or life events
- Sets relevant, realistic, and challenging goals and develops a comprehensive plan for achieving those goals

Optional Student Learning Outcomes:
- Skillfully uses written language to convey ideas and understanding
- Demonstrates command of standard English conventions

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Instructions

Reflect on what you have learned about in the workshop, including the most helpful pieces of information and what you plan to do with the information you now have.

- Write a one-page reflection in which you address the following questions:
- What information resonated with you about today’s workshop?
- What information was new to you?
- What information was most helpful to learn about? Why?
- What knowledge can you pass on or share with family members?
- What next steps can you take based on what you learned?
STUDENT REFLECTION

In today’s workshop, I learned about:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

The most helpful piece of information I learned was:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

After today’s workshop, I plan to:

______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________
______________________________________________________________________________

<table>
<thead>
<tr>
<th>HOMEWORK</th>
<th>PRE-WORK FOR WORKSHOP ON:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Share the budget you began working on with your parent(s)/family.</td>
<td></td>
</tr>
</tbody>
</table>
Purpose
The purpose of this lesson is for students to increase their familiarity and knowledge of Excel and complete an expense table for one college.

Suggested Grade Level:
12

Approximate Time Needed:
40 minutes

Materials and Handouts
Personal Budget How To Guide
Building Your Budget Funding Section
Intro to Microsoft Excel
Budgeting 202 2014 15 Personal Budgeting Analysis

Student-Facing Instructions
Complete this budget line-by-line, thinking about your current financial situation and your situation next year once you are enrolled in college. While some of the numbers may be estimates, do your best to report honest and realistic figures. If the expense or income item does not apply to you, enter “N/A.” A good place to start researching these college costs is to look at your college websites, but always keep in mind that the numbers posted there are AVERAGES of the students who are currently enrolled in that university. Log in any costs you have, even if they will be covered by your parents or family. You can offset those costs in the “Parent Contribution” section of the budget. You can also use your financial aid award letter (if applicable) to complete some of the income sections. Your financial gap will automatically be calculated by Excel at the bottom of this worksheet (Expense total - Income total).

This worksheet will not only determine your financial gap, but will also help you better understand your financial situation. Remember, this is a PERSONAL financial budget so your figures should reflect your own personal and financial circumstances.

Teacher Notes
This lesson is a first step in creating a completed budget in Budgeting 203.

Assessment
Completion of Budget Spreadsheet & Description Section

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Instructions

Complete this budget line-by-line, thinking about your current financial situation and your situation next year once you are enrolled in college. While some of the numbers may be estimates, do your best to report honest and realistic figures. If the expense or income item does not apply to you, enter “N/A.” A good place to start researching these college costs is to look at your college websites, but always keep in mind that the numbers posted there are AVERAGES of the students who are currently enrolled in that university. Log in any costs you have, even if they will be covered by your parents or family. You can offset those costs in the “Parent Contribution” section of the budget. You can also use your financial aid award letter (if applicable) to complete some of the income sections. Your financial gap will automatically be calculated by Excel at the bottom of this worksheet (Expense total - Income total).

This worksheet will not only determine your financial gap, but will also help you better understand your financial situation. Remember, this is a PERSONAL financial budget so your figures should reflect your own personal and financial circumstances.

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PERSONAL BUDGET: “HOW TO” GUIDE

FINANCIAL GAP ANALYSIS (RED TAB): This tab compares the financial gap for each budget created, allowing you to view your schools side-by-side and assess the amount needed to attend each college.

<table>
<thead>
<tr>
<th>College 1</th>
<th>- College 1'82</th>
<th>College 2</th>
<th>- College 2'82</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>College 3</th>
<th>- College 3'82</th>
<th>College 4</th>
<th>- College 4'82</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

PERSONAL BUDGET FOR COLLEGES 1-4 (GREEN TABS): Four blank budget spreadsheets are available for you. You must complete the “College 1” and “College 2” spreadsheets for a minimum of two budgets.

<table>
<thead>
<tr>
<th>College</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>College 1</td>
<td>Create a budget for the school you most want to attend</td>
</tr>
<tr>
<td>College 2</td>
<td>Create a budget for the school you can most easily afford (Target: Financial gap of $2000 or less)</td>
</tr>
<tr>
<td>College 3 and 4</td>
<td>Create budgets for other schools you are interested in. Consider listing state schools, private and out-of-state schools, and two-year community colleges.</td>
</tr>
</tbody>
</table>

BUILDING YOUR BUDGET – “EX PEN SE” SECTION:
1. Read the instructions (also located in row one of each budget spreadsheet):

Instructions: Complete this budget line-by-line, thinking about your current financial situation and your situation next year once you are enrolled in college. While some of the numbers may be estimates, do your best to report honest and realistic figures. If the expense or income item does not apply to you, enter “N/A.” A good place to start researching these college costs is to look at your college websites, but always keep in mind that the numbers posted there are AVERAGES of the students who are currently enrolled in that university. Log in any costs you have, even if they will be covered by your parents or family. You can offset those costs in the “Parent Contribution” section of the budget. You can also use your financial aid award letter (if applicable) to complete some of the income sections. Your financial gap will automatically be calculated by Excel at the bottom of this worksheet (Expense total - Income total).

This worksheet will not only determine your financial gap, but will also help you better understand your financial situation. Remember, this is a PERSONAL financial budget so your figures should reflect your own personal and financial circumstances.
2. Enter your college name in cell B2 (column B, row 2).

3. Decide if your school operates on a semester or quarter schedule. Delete column C or D for whichever does not apply. (To delete a column: Move your mouse over the column you wish to remove – they are lettered at the top of the spreadsheet. The icon is an arrow pointing downward. Right click on the column you wish to delete and select “Delete.”)

4. Complete the “Expense” section of the budget (rows 4-44). Note the headers for this section:

<table>
<thead>
<tr>
<th>Column Headers</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column A: Expenses</td>
<td>Lists various expenses associated with attending college and living on your own. These are listed by category (e.g. housing/rent, meal plan/food, transportation)</td>
</tr>
<tr>
<td>Column B: By Academic Year</td>
<td>List the cost for each expense item by year. You may need to manipulate your semester/quarter or monthly figure to calculate this. Remember, an academic year is typically 9-10 months.</td>
</tr>
<tr>
<td>Column C: By Semester</td>
<td>List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.</td>
</tr>
<tr>
<td>Column D: By Quarter</td>
<td>List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.</td>
</tr>
<tr>
<td>Column E: By Month</td>
<td>List the cost for each expense by month. You may need to manipulate your academic year or semester/quarter figures to calculate this.</td>
</tr>
<tr>
<td>Column F: Type of Expense</td>
<td>Categorize each expense as “fixed,” flexible,” or “discretionary.”</td>
</tr>
<tr>
<td>Column G: Description</td>
<td>Provide a detailed description of how you calculated your expenses. The goal of this exercise is to create a budget that can stand alone and this column allows you to explain how you came up with the figures listed and prove that they are not arbitrary numbers.</td>
</tr>
</tbody>
</table>

*NOTE: Each expense category can be expanded and collapsed via the (+) and (-) icons located on the left side of the spreadsheet.*
5. **Enter Your Expenses:** Your final budget should use numbers that are as realistic for your personal situation as possible.

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>By Academic Year</th>
<th>By Semester</th>
<th>By Quarter</th>
<th>By Month</th>
<th>Type of Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition and Fees</td>
<td>$13,398.00</td>
<td>n/a</td>
<td>$4,466.00</td>
<td>$1,488.67</td>
<td>Fixed</td>
</tr>
<tr>
<td>Books and Supplies (including computer)</td>
<td>$1,400.00</td>
<td>n/a</td>
<td>$466.67</td>
<td>$155.56</td>
<td>Flexible</td>
</tr>
</tbody>
</table>

*NOTE:* Any cell with a red triangle in the top right-hand corner contains a comment. Comments provide further explanation of the line item – read these carefully as you complete the appropriate cell.

6. **Use Formulas:** Where appropriate, use formulas to calculate the monthly, quarter/semester, or academic year numbers. **DO NOT USE A CALCULATOR TO DO THIS MATH.** See the “Intro to Microsoft Excel” handout to get more information on formulas.

7. **Review Your Expense Total:** As you enter numbers into the spreadsheet, your expense total is calculated in row 44.
BUILDING YOUR BUDGET – “FUN DIVING” SECTION:

1. Proceed to the “Income” section of the budget (rows 46-80). Note the headers for this section:

<table>
<thead>
<tr>
<th>Column Headers</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column A: Secured Funding</td>
<td>List the funding sources you have secured to pay for your college education. The categories include scholarships, grants, income sources, savings/parent support, and loans.</td>
</tr>
<tr>
<td>Column B: By Academic Year</td>
<td>List the value of the funding by academic year. You may need to manipulate your semester/quarter or monthly figures to calculate this. Remember, an academic year is typically 9-10 months.</td>
</tr>
<tr>
<td>Column C: By Semester</td>
<td>List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.</td>
</tr>
<tr>
<td>Column D: By Quarter</td>
<td>List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.</td>
</tr>
<tr>
<td>Column E: By Month</td>
<td>List the cost for each expense by month. You may need to manipulate your academic year or semester/quarter figures to calculate this.</td>
</tr>
</tbody>
</table>

*NOTE: Each funding category can be expanded and collapsed via the (+) and (-) icons located on the left side of the spreadsheet.

2. Enter any Secured Funding Amounts: Information you enter on this table should already be secured or offered to you in the form of an award or scholarship letter. Talk with your parent(s)/family to assess if they are able to support any of your college costs. Think broadly – this could include money your family will pay directly to the college or any expenses they will cover (e.g. car or health insurance, cell phone bill, food, etc.)
3. **Use Formulas**: Where appropriate, use formulas to calculate the monthly, quarter/semester, or academic year numbers. **DO NOT USE A CALCULATOR TO DO THIS MATH.** See the “Intro to Microsoft Excel” handout to get more information on formulas.

<table>
<thead>
<tr>
<th>SECURED FUNDING</th>
<th>By Academic Year</th>
<th>By Semester</th>
<th>By Quarter</th>
<th>By Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarships (see breakdown)</td>
<td>$1,000.00</td>
<td>n/a</td>
<td>-$848.75</td>
<td>$111.11</td>
</tr>
</tbody>
</table>

4. **Review Your Income Total**: As you enter numbers into the spreadsheet, your income total is calculated. **Row 70 provides the income total for all funding secured, excluding loans. Row 80 provides the income total for all funding secured, including loans.**

<table>
<thead>
<tr>
<th>ESTIMATED INCOME TOTAL</th>
<th>$32,042.00</th>
<th>$0.00</th>
<th>$10,680.67</th>
<th>$3,560.22</th>
</tr>
</thead>
<tbody>
<tr>
<td>(without loans):</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ESTIMATED INCOME TOTAL</td>
<td>$33,542.00</td>
<td>$0.00</td>
<td>$11,180.67</td>
<td>$3,726.89</td>
</tr>
<tr>
<td>(with loans):</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**BUILDING YOUR BUDGET – “FINANCIAL GAP” SECTION:**

1. The last section of the budget is the financial gap table located at the bottom of the spreadsheet (rows 82-85). Your financial gap is automatically calculated by subtracting your income total from your expense total. This figure will be reported by academic year, semester/quarter, and month. Remember, your financial gap refers to **additional money needed** in order to cover that specific college’s costs.

<table>
<thead>
<tr>
<th>Financial Gap (EXPENSE-INC)</th>
<th>Maximum Gap / &quot;Worst Case Scenario&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>By Academic Year</td>
</tr>
<tr>
<td>FINANCIAL GAP (without loans)</td>
<td>$1,586.00</td>
</tr>
<tr>
<td>FINANCIAL GAP (with loans)</td>
<td>$86.00</td>
</tr>
</tbody>
</table>

2. The gap total is linked to the “Financial Gap Analysis” tab so you are able to compare your financial gap from each college side-by-side.

---

**SAMPLE BUDGET (BLUE TAB)**: The last spreadsheet in this file is a sample budget for UC Santa Cruz. This gives you a rough idea of the level of detail you should have for your own budgets.
INTRO TO MICROSOFT EXCEL

What is Microsoft Excel?
Microsoft Excel is a program that stores, sorts, and analyzes data. By entering data into this spreadsheet, you can do calculations, make graphs, and perform other data analysis operations. For our purposes, we are using Excel to create a budget. It will be particularly helpful in calculating numbers quickly and will perform these calculations for you once you enter in the appropriate formula.

HOW TO:

❖ **Enter Data:** The budget is pre-formatted so you can begin entering your data in the cells (the grid-like boxes that make up the spreadsheet). The numerical data you enter will be formatted as currency and a running total of your expenses, income, and financial gap will be calculated as you enter data.

❖ **Adjust the Row Height:** If you need more space in any of the cells, especially for your explanations, move your mouse to the left-side of the spreadsheet. Each row is numbered – hold your mouse over the row you want to extend and an icon will appear (the symbol is a dash with an arrow pointing up and an arrow pointing down). Click and slide your mouse up or down to adjust the height.

❖ **Delete Columns:** Move your mouse over the column you wish to delete – they are lettered at the top of the spreadsheet. The icon is an arrow pointing downward. Right click on the column you wish to delete and select “Delete.”

❖ **Copy and Paste:** Like Microsoft Word, you can copy data by highlighting the appropriate data and holding down the “control” and “c” key at the same time. To paste, select the cell you want to place your data in and hold down the “control” and “v” key at the same time. This may be helpful for your “Type of Expense” column.

❖ **Use Formulas:** With formulas, you don’t need to do any calculations; the program does it all for you! Simply click in the appropriate cell and enter the formula. See the sample below:

SAMPLE SPREADSHEET:

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>3</td>
<td>7</td>
</tr>
<tr>
<td>2</td>
<td>4</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>3</td>
<td>5</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>1</td>
<td>4</td>
</tr>
<tr>
<td>5</td>
<td>3</td>
<td>1</td>
<td>9</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Math Function</th>
<th>Formula</th>
<th>Example</th>
<th>Sample Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiplication</td>
<td>= (click on cell) * (value)</td>
<td>= (C3) * 9</td>
<td>= (3) * 9 * 27</td>
</tr>
<tr>
<td>Division</td>
<td>= (click on cell) / (value)</td>
<td>= (C5) / 9</td>
<td>= (9) / 9 * 1</td>
</tr>
<tr>
<td>Addition</td>
<td>To add 2 cells: = sum (click on cell 1, click on cell 2) To add a range of cells in a row or column: = sum (highlight cells in row or column)</td>
<td>= sum (B1, B3) = sum (B1: B5)</td>
<td>= sum (3, 2) * 5 = sum (3: 1) * 8</td>
</tr>
<tr>
<td>Subtraction</td>
<td>= (cell 1) - (cell 2)</td>
<td>= (A3) - (A1)</td>
<td>= (5) - (1) * 4</td>
</tr>
</tbody>
</table>
### College 1:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### College 2:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td></td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td></td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td></td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td></td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td></td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td></td>
</tr>
</tbody>
</table>

### College 3:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

### College 4:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td></td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td></td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td></td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td></td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td></td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td></td>
</tr>
</tbody>
</table>

### SAMPLE:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$33,628.00</td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td>$32,042.00</td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td>$1,586.00</td>
</tr>
</tbody>
</table>

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$33,628.00</td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td>$33,542.00</td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td>$86.00</td>
</tr>
</tbody>
</table>
Unit Culminating Task:
Budgeting 203: College Funding - Personal Budget How-To Guide

Purpose
The purpose of this lesson is for students to continue building their familiarity and knowledge of Excel and complete the funding table for one college.

Suggested Grade Level:
12

Approximate Time Needed:
40 minutes

Materials and Handouts
Personal Budget How To Guide
Building Your Budget Funding Section
Intro to Microsoft Excel
Budgeting 202 2014 15 Personal Budgeting Analysis

Student-Facing Instructions
Complete this budget line-by-line, thinking about your current financial situation and your situation next year once you are enrolled in college. While some of the numbers may be estimates, do your best to report honest and realistic figures. If the expense or income item does not apply to you, enter “N/A.” A good place to start researching these college costs is to look at your college websites, but always keep in mind that the numbers posted there are AVERAGES of the students who are currently enrolled in that university. Log in any costs you have, even if they will be covered by your parents or family. You can offset those costs in the “Parent Contribution” section of the budget. You can also use your financial aid award letter (if applicable) to complete some of the income sections. Your financial gap will automatically be calculated by Excel at the bottom of this worksheet (Expense total - Income total).

This worksheet will not only determine your financial gap, but will also help you better understand your financial situation. Remember, this is a PERSONAL financial budget so your figures should reflect your own personal and financial circumstances.

Teacher Notes
Unit Culminating Task Prerequisites: Three “Budgeting 103” lessons and “Budgeting 202: College Expenses - Personal Budget How-To Guide”

Curriculum developed in partnership with Danielle Johnson, Gateway High School, San Francisco, and adapted from the GLOW Foundation Financial Literacy curriculum. Copyright © 2014 GLOW. All Rights Reserved.
Assessment

Culminating Assessment: Budget Spreadsheet & Description as rationale assessed against aligned rubric:

Student Learning Outcomes assessed in this task:

- Apply mathematical reasoning/procedures in an accurate and complete manner
- Identifies multiple plausible approaches to solving a problem, and weighs the effectiveness of these approaches
Instructions

Complete this budget line-by-line, thinking about your current financial situation and your situation next year once you are enrolled in college. While some of the numbers may be estimates, do your best to report honest and realistic figures. If the expense or income item does not apply to you, enter “N/A.” A good place to start researching these college costs is to look at your college websites, but always keep in mind that the numbers posted there are AVERAGES of the students who are currently enrolled in that university. Log in any costs you have, even if they will be covered by your parents or family. You can offset those costs in the “Parent Contribution” section of the budget. You can also use your financial aid award letter (if applicable) to complete some of the income sections. Your financial gap will automatically be calculated by Excel at the bottom of this worksheet (Expense total - Income total).

This worksheet will not only determine your financial gap, but will also help you better understand your financial situation. Remember, this is a PERSONAL financial budget so your figures should reflect your own personal and financial circumstances.
PERSONAL BUDGET: “HOW TO” GUIDE

FINANCIAL GAP ANALYSIS (RED TAB): This tab compares the financial gap for each budget created, allowing you to view your schools side-by-side and assess the amount needed to attend each college.

<table>
<thead>
<tr>
<th>College 1</th>
<th>College 2</th>
<th>College 3</th>
<th>College 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
<td>Income Total (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
<td>Financial Gap per Year (without Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Expense Total</td>
<td>$0.00</td>
<td>Expense Total</td>
<td>$0.00</td>
</tr>
<tr>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
<td>Income Total (with Loans)</td>
<td>$0.00</td>
</tr>
<tr>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
<td>Financial Gap per Year (with Loans)</td>
<td>$0.00</td>
</tr>
</tbody>
</table>

PERSONAL BUDGET FOR COLLEGES 1-4 (GREEN TABS): Four blank budget spreadsheets are available for you. You must complete the “College 1” and “College 2” spreadsheets for a minimum of two budgets.

<table>
<thead>
<tr>
<th>College</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>College 1</td>
<td>Create a budget for the school you most want to attend</td>
</tr>
<tr>
<td>College 2</td>
<td>Create a budget for the school you can most easily afford (Target: Financial gap of $2000 or less)</td>
</tr>
<tr>
<td>College 3 and 4</td>
<td>Create budgets for other schools you are interested in. Consider listing state schools, private and out-of-state schools, and two-year community colleges.</td>
</tr>
</tbody>
</table>

BUILDING YOUR BUDGET – “EX PENSE” SECT I ON:

1. **Read the instructions** (also located in row one of each budget spreadsheet):

Instructions: Complete this budget line-by-line, thinking about your current financial situation and your situation next year once you are enrolled in college. While some of the numbers may be estimates, do your best to report honest and realistic figures. If the expense or income item does not apply to you, enter “N/A.” A good place to start researching these college costs is to look at your college websites, but always keep in mind that the numbers posted there are AVERAGES of the students who are currently enrolled in that university. Log in any costs you have, even if they will be covered by your parents or family. You can offset those costs in the "Parent Contribution" section of the budget. You can also use your financial aid award letter (if applicable) to complete some of the income sections. Your financial gap will automatically be calculated by Excel at the bottom of this worksheet (Expense total - Income total).

This worksheet will not only determine your financial gap, but will also help you better understand your financial situation. Remember, this is a PERSONAL financial budget so your figures should reflect your own personal and financial circumstances.
2. **Enter your college name** in cell B2 (column B, row 2).

3. **Decide if your school operates on a semester or quarter schedule.** Delete column C or D for whichever does not apply. (To delete a column: Move your mouse over the column you wish to remove – they are lettered at the top of the spreadsheet. The icon is an arrow pointing downward. Right click on the column you wish to delete and select “Delete.”)

4. **Complete the “Expense” section of the budget (rows 4-44).** Note the headers for this section:

<table>
<thead>
<tr>
<th>College 1:</th>
<th>EXPENSES</th>
<th>By Academic Year</th>
<th>By Semester</th>
<th>By Quarter</th>
<th>By Month</th>
<th>Type of Expense</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Tuition and Fees</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Books and Supplies (including computer)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Housing/Rent</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Housing/Rent (see breakdown)</td>
<td></td>
</tr>
<tr>
<td>Utilities: Electricity, Water</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Utilities: Cable, Internet</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phone: Landline or Mobile Phone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Home Costs: Furniture, Appliances</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   **Column Headers** | **Description**
   --- | ---
   **Column A: Expenses** | Lists various expenses associated with attending college and living on your own. These are listed by category (e.g. housing/rent, meal plan/food, transportation)
   **Column B: By Academic Year** | List the cost for each expense item by year. You may need to manipulate your semester/quarter or monthly figure to calculate this. Remember, an academic year is typically 9-10 months.
   **Column C: By Semester** | List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.
   **Column D: By Quarter** | List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.
   **Column E: By Month** | List the cost for each expense by month. You may need to manipulate your academic year or semester/quarter figures to calculate this.
   **Column F: Type of Expense** | Categorize each expense as “fixed,” “flexible,” or “discretionary.”
   **Column G: Description** | Provide a detailed description of how you calculated your expenses. The goal of this exercise is to create a budget that can stand alone and this column allows you to explain how you came up with the figures listed and prove that they are not arbitrary numbers.

**NOTE:** Each expense category can be expanded and collapsed via the (+) and (-) icons located on the left side of the spreadsheet.
5. **Enter Your Expenses:** Your final budget should use numbers that are as realistic for your personal situation as possible.

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>By Academic Year</th>
<th>By Semester</th>
<th>By Quarter</th>
<th>By Month</th>
<th>Type of Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition and Fees</td>
<td>$13,398.00</td>
<td>n/a</td>
<td>$4,466.00</td>
<td>$1,488.67</td>
<td>Fixed</td>
</tr>
<tr>
<td>Books and Supplies (including computer)</td>
<td>$1,400.00</td>
<td>n/a</td>
<td>$466.67</td>
<td>$155.56</td>
<td>Flexible</td>
</tr>
</tbody>
</table>

*NOTE:* Any cell with a red triangle in the top right-hand corner contains a comment. Comments provide further explanation of the line item – read these carefully as you complete the appropriate cell.

6. **Use Formulas:** Where appropriate, use formulas to calculate the monthly, quarter/semester, or academic year numbers. *DO NOT USE A CALCULATOR TO DO THIS MATH.* See the “Intro to Microsoft Excel” handout to get more information on formulas.

<table>
<thead>
<tr>
<th>EXPENSES</th>
<th>By Academic Year</th>
<th>By Semester</th>
<th>By Quarter</th>
<th>By Month</th>
<th>Type of Expense</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tuition and Fees</td>
<td>$13,398.00</td>
<td>n/a</td>
<td>$4,466.00</td>
<td>$1,488.67</td>
<td>Fixed</td>
</tr>
</tbody>
</table>

7. **Review Your Expense Total:** As you enter numbers into the spreadsheet, your expense total is calculated in row 44.
BUILDING YOUR BUDGET – “FUN D I NG” SECTION:

1. Proceed to the “Income” section of the budget (rows 46-80). Note the headers for this section:

<table>
<thead>
<tr>
<th>Column Headers</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Column A: Secured Funding</td>
<td>List the funding sources you have secured to pay for your college education. The categories include scholarships, grants, income sources, savings/parent support, and loans.</td>
</tr>
<tr>
<td>Column B: By Academic Year</td>
<td>List the value of the funding by academic year. You may need to manipulate your semester/quarter or monthly figures to calculate this. Remember, an academic year is typically 9-10 months.</td>
</tr>
<tr>
<td>Column C: By Semester</td>
<td>List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.</td>
</tr>
<tr>
<td>Column D: By Quarter</td>
<td>List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.</td>
</tr>
<tr>
<td>Column E: By Month</td>
<td>List the cost for each expense by month. You may need to manipulate your academic year or semester/quarter figures to calculate this.</td>
</tr>
</tbody>
</table>

*NOTE*: Each funding category can be expanded and collapsed via the (+) and (-) icons located on the left side of the spreadsheet.

2. Enter any Secured Funding Amounts: Information you enter on this table should already be secured or offered to you in the form of an award or scholarship letter. Talk with your parent(s)/family to assess if they are able to support any of your college costs. Think broadly – this could include money your family will pay directly to the college or any expenses they will cover (e.g. car or health insurance, cell phone bill, food, etc.)
3. **Use Formulas**: Where appropriate, use formulas to calculate the monthly, quarter/semester, or academic year numbers. *DO NOT USE A CALCULATOR TO DO THIS MATH.* See the “Intro to Microsoft Excel” handout to get more information on formulas.

<table>
<thead>
<tr>
<th>SECURED FUNDING</th>
<th>By Academic Year</th>
<th>By Semester</th>
<th>By Quarter</th>
<th>By Month</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scholarships (see breakdown)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>48 Smart Cookie Scholarship</td>
<td>$1,000.00</td>
<td>n/a</td>
<td>-848/3</td>
<td>$111.11</td>
</tr>
</tbody>
</table>

4. **Review Your Income Total**: As you enter numbers into the spreadsheet, your income total is calculated. Row 70 provides the income total for all funding secured, excluding loans. Row 80 provides the income total for all funding secured, including loans.

<table>
<thead>
<tr>
<th>ESTIMATED INCOME TOTAL (without loans):</th>
<th>$32,042.00</th>
<th>$0.00</th>
<th>$10,680.67</th>
<th>$3,560.22</th>
</tr>
</thead>
<tbody>
<tr>
<td>ESTIMATED INCOME TOTAL (with loans):</td>
<td>$33,542.00</td>
<td>$0.00</td>
<td>$11,180.67</td>
<td>$3,726.89</td>
</tr>
</tbody>
</table>

**BUILDING YOUR BUDGET — “FINANCIAL GAP” SECTION:**

1. The last section of the budget is the financial gap table located at the bottom of the spreadsheet (rows 82-85). Your financial gap is automatically calculated by subtracting your income total from your expense total. This figure will be reported by academic year, semester/quarter, and month. Remember, your financial gap refers to *additional money needed* in order to cover that specific college’s costs.

<table>
<thead>
<tr>
<th>Financial Gap (EXPENSE-INCOME)</th>
<th>Maximum Gap / &quot;Worst Case Scenario&quot;</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>By Academic Year</td>
</tr>
<tr>
<td>FINANCIAL GAP (without loans)</td>
<td>$1,586.00</td>
</tr>
<tr>
<td>FINANCIAL GAP (with loans)</td>
<td>$86.00</td>
</tr>
</tbody>
</table>

2. The gap total is linked to the “Financial Gap Analysis” tab so you are able to compare your financial gap from each college side-by-side.

---

**SAMPLE BUDGET (BLUE TAB)**: The last spreadsheet in this file is a sample budget for UC Santa Cruz. This gives you a rough idea of the level of detail you should have for your own budgets.
INTRO TO MICROSOFT EXCEL

What is Microsoft Excel?
Microsoft Excel is a program that stores, sorts, and analyzes data. By entering data into this spreadsheet, you can do calculations, make graphs, and perform other data analysis operations. For our purposes, we are using Excel to create a budget. It will be particularly helpful in calculating numbers quickly and will perform these calculations for you once you enter in the appropriate formula.

HOW TO:

* Enter Data: The budget is pre-formatted so you can begin entering your data in the cells (the grid-like boxes that make up the spreadsheet). The numerical data you enter will be formatted as currency and a running total of your expenses, income, and financial gap will be calculated as you enter data.

* Adjust the Row Height: If you need more space in any of the cells, especially for your explanations, move your mouse to the left-side of the spreadsheet. Each row is numbered – hold your mouse over the row you want to extend and an icon will appear (the symbol is a dash with an arrow pointing up and an arrow pointing down). Click and slide your mouse up or down to adjust the height.

* Delete Columns: Move your mouse over the column you wish to delete – they are lettered at the top of the spreadsheet. The icon is an arrow pointing downward. Right click on the column you wish to delete and select “Delete.”

* Copy and Paste: Like Microsoft Word, you can copy data by highlighting the appropriate data and holding down the “control” and “c” key at the same time. To paste, select the cell you want to place your data in and hold down the “control” and “v” key at the same time. This may be helpful for your “Type of Expense” column.

* Use Formulas: With formulas, you don’t need to do any calculations; the program does it all for you! Simply click in the appropriate cell and enter the formula. See the sample below:

SAMPLE SPREADSHEET:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>3</td>
</tr>
<tr>
<td>2</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>3</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>4</td>
<td>3</td>
<td>1</td>
</tr>
<tr>
<td>5</td>
<td>3</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Math Function</th>
<th>Formula</th>
<th>Example</th>
<th>Sample Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Multiplication</td>
<td>= (click on cell)* (value)</td>
<td>= (C3)*9</td>
<td>= (3)*9  *27</td>
</tr>
<tr>
<td>Division</td>
<td>= (click on cell) / (value)</td>
<td>= (C5)/9</td>
<td>= (9)/9  *1</td>
</tr>
<tr>
<td>Addition</td>
<td>To add 2 cells: = sum (click on cell 1, click on cell 2)</td>
<td>= sum (B1:B3)</td>
<td>= sum (3,2)  *5</td>
</tr>
<tr>
<td></td>
<td>To add a range of cells in a row or column:</td>
<td>= sum (B1:B5)</td>
<td>= sum (3:1)  *8</td>
</tr>
<tr>
<td></td>
<td>= sum (highlight cells in row or column)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Subtraction</td>
<td>= (cell1) - (cell2)</td>
<td>= (A3) - (A1)</td>
<td>= (5) - (1)  *4</td>
</tr>
<tr>
<td>College 1:</td>
<td>Expense Total</td>
<td>Income Total (without Loans)</td>
<td>Financial Gap per Year (without Loans)</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------</td>
<td>------------------------------</td>
<td>----------------------------------------</td>
</tr>
<tr>
<td></td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>College 2:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College 3:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>College 4:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Sample:**

- Expense Total: $33,628.00
- Income Total (without Loans): $32,042.00
- Financial Gap per Year (without Loans): $1,586.00
- Expense Total: $33,628.00
- Income Total (with Loans): $33,542.00
- Financial Gap per Year (with Loans): $86.00