

Theme: Exploring College.....	3
Explore College Options Related to Interests.....	4
Research College Options.....	41
Visit a College.....	75
Theme: Building a College Success Network.....	107
Learn About Networks and Their Value.....	108
Build Your Own Network.....	119
Utilize Network to Expand Resources and Opportunities.....	134
Theme: Path to College.....	141
My Graduation Plan.....	142
College Admission Plan.....	192
Theme: Community Service & Extracurricular Activities.....	217
Document Community Service Hours & Extracurricular Activities.....	218
Theme: Financial Aid Literacy.....	227
Understanding Financial Aid Options Available.....	228
Understand and Successfully Complete FAFSA and Other Financial Aid Applications.....	289
Interpret and Plan from Financial Aid Package/Award Letter.....	376

Theme: College Application.....	401
General Application Information.....	402
Apply to EOP at UCs or CSUs.....	462
Apply to UC.....	478
Apply to Private.....	525
Apply to Community College.....	552
Apply to Texas Universities.....	577
Apply to New York Universities.....	581
Theme: Transition to College Success.....	590
Complete Steps to Secure College Enrollment.....	591
Prepare for the Rigor Culture of College.....	600
Prepare for the Costs of College.....	615

# **Theme:**

# **Exploring College**

# Explore College Options Related to Interests



# What I Want for My Future

## Purpose

This activity is designed to help students start thinking about how they will feel successful in life and why this is 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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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.

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

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

#4: \_\_\_\_\_

#5: \_\_\_\_\_

#6: \_\_\_\_\_

#7: \_\_\_\_\_

#8: \_\_\_\_\_

#9: \_\_\_\_\_

#10: \_\_\_\_\_

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## 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...

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---

---

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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## 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.



## 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

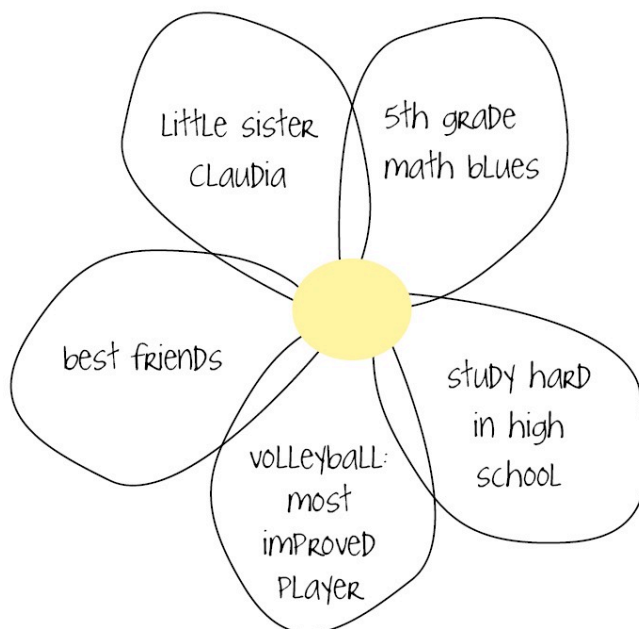
#1 - My earliest memory is lying on the floor with my dog, watching TV.

#2 - Math is hard for me. I nearly failed math in 5<sup>th</sup> 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.

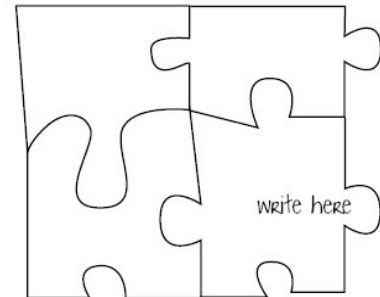
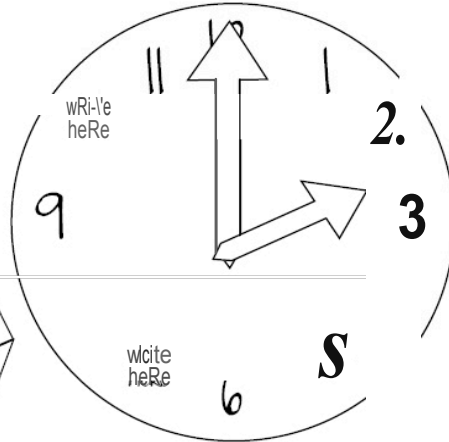
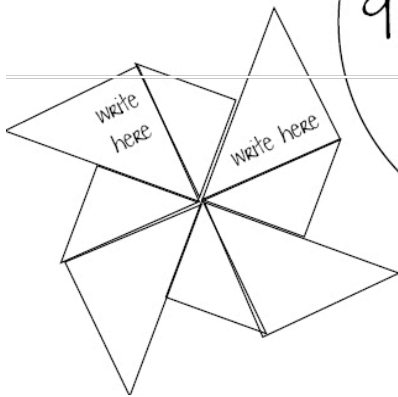
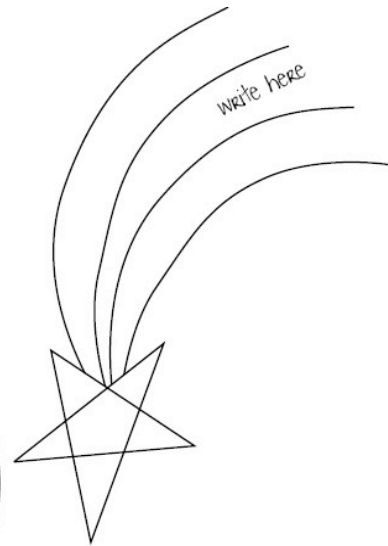
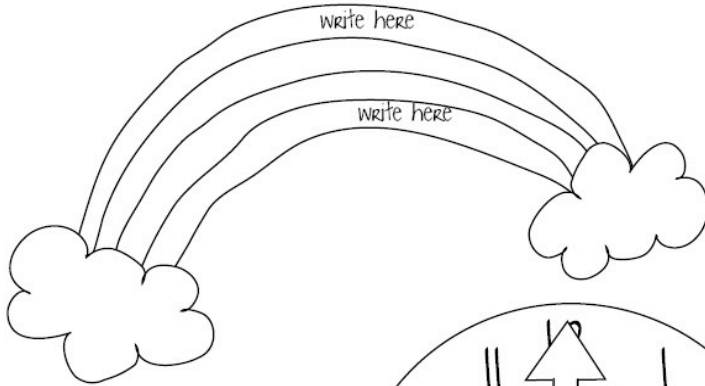
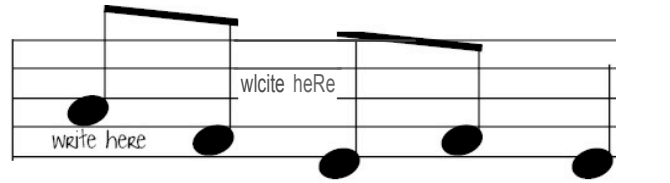
My Life is Like a:



### 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.

# rv|Life ■ Lite £Jl:



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

## 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

## 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”.

## 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:

<p><b>1. THE PROCRASTINATOR</b></p> <ul style="list-style-type: none"><li>– Exam is tomorrow</li><li>– Late for school</li><li>– Project due today</li></ul> <p>Bottom line: Puts off things to do until they become a crisis.</p>	<p><b>2. THE PRIORITIZER</b></p> <ul style="list-style-type: none"><li>– Essay is due in a week</li><li>– Time in schedule for friends, exercise, etc.</li><li>– Relaxes after work is done</li></ul> <p>Bottom line: Looks at everything there is to do and then prioritizes first things first and last things last.</p>
<p><b>3. THE YES-MAN</b></p> <ul style="list-style-type: none"><li>– Unimportant phone calls</li><li>– Other people's problems</li><li>– Peer pressure</li></ul> <p>Bottom line: Spends so much time pleasing others that things to do fall to the bottom of the list.</p>	<p><b>4. THE SLACKER</b></p> <ul style="list-style-type: none"><li>– Too much TV</li><li>– Excessive video games</li><li>– Endless texting or phone calls</li></ul> <p>Bottom line: Wastes time and doesn't take responsibility for things that need to get done.</p>

# 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.

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

#1: \_\_\_\_\_

#2: \_\_\_\_\_

#3: \_\_\_\_\_

#4: \_\_\_\_\_

#5: \_\_\_\_\_

#6: \_\_\_\_\_

#7: \_\_\_\_\_

#8: \_\_\_\_\_

#9: \_\_\_\_\_

#10: \_\_\_\_\_

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## 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...

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To me, this is important because...

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

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That is important to me because...

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3. Finally, I will be successful if I...

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That is important to me because...

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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.



# Options After High School Worksheet

## 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.

## 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.

## 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.

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## 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.

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## 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.

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## 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.

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## 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?

PLAN	10th Grade
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PSAT	11th Grade Fall (some schools offer a practice PSAT in 10 <sup>th</sup> grade)
ACT	11th Grade Spring/12th Grade Fall
SAT Reasoning and SAT Subject Tests	11th Grade Spring/12th Grade Fall

### 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:

Option	Four-Year College or University
What Is It?	A school that lets you earn a Bachelor's Degree (B.A.); you attend for four years.
Why It Might Be a Good Fit for Me	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.
Why It Might Not Be a Good Fit for Me	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.

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

Options:

Community College

Four-Year University or College

Career or Technical College

Art School

Online Program

Gap Year

On-the-Job Training



The Two Options that Look the Best for Me Are:

Option	
What Is It?	
Why It Might Be a Good Fit for Me	
Why It Might Not Be a Good Fit for Me	

Option	
What Is It?	
Why It Might Be a Good Fit for Me	
Why It Might Not Be a Good Fit for Me	

## 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.

## 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

### 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

# Key College Terms

## 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.

## 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.

## It's All About College - Key Terms

	Notes, Definitions
<b>Associate's Degree</b>	
<b>Bachelor's Degree</b>	
<b>Campus</b>	
<b>Certificate Program</b>	
<b>Community College</b>	
<b>Commuter Campus</b>	
<b>Credit Hours</b>	
<b>Dormitory</b>	
<b>Extracurricular Activities</b>	
<b>Financial Aid</b>	



	Notes, Definitions
<b>Major</b>	
<b>Minor</b>	
<b>Private Institution</b>	
<b>Residential Campus</b>	
<b>Rolling Admissions</b>	
<b>State University</b>	
<b>Technical (or Trade) School</b>	

# 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.

## 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”.

# 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.

## **LOCATION**

- ☐ In your hometown    ☐ In your home state    ☐ Out of state; where?

## **TYPE**

- ☐ 4-year college or university    ☐ 2-year college    ☐ Business, Trade, or Technical School

## **ENVIRONMENT**

- ☐ Urban    ☐ Suburban    ☐ Small Town    ☐ Rural

## **LIVING ARRANGEMENTS**

- ☐ At home    ☐ On-campus dormitory    ☐ Off-campus apartment

## **SIZE**

- ☐ Large (greater than 10,000)    ☐ Medium (4,000-10,000)    ☐ Small (fewer than 4,000)

## **ADMISSIONS CRITERIA**

- ☐ Highly competitive - A or B grade point average; top 20% of class; SAT 1800-2400; ACT above 29
- ☐ Competitive - B/C grade point average; top 50% of class; SAT 1500-1800; ACT above 21
- ☐ Less Competitive - C- grade point average; top 65% of class; SAT below 1500; ACT below 21
- ☐ Non-Competitive - C to D grade point average; no admissions test required

**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**

- |  |  |
|--|--|
| <input type="checkbox"/> Agricultural              | <input type="checkbox"/> General Studies           |
| <input type="checkbox"/> Biological Studies        | <input type="checkbox"/> Liberal Arts              |
| <input type="checkbox"/> Business                  | <input type="checkbox"/> International Relations   |
| <input type="checkbox"/> Communications/Journalism | <input type="checkbox"/> Law/Criminal Justice      |
| <input type="checkbox"/> Computer Science          | <input type="checkbox"/> Media Arts/Communications |
| <input type="checkbox"/> Culinary Arts             | <input type="checkbox"/> Medicine                  |
| <input type="checkbox"/> Education                 | <input type="checkbox"/> Political Science         |
| <input type="checkbox"/> Engineering               | <input type="checkbox"/> Psychology                |
| <input type="checkbox"/> Fine Arts/Applied Arts    | <input type="checkbox"/> Recreation                |
| <input type="checkbox"/> Foreign Language          | <input type="checkbox"/> Social Sciences           |
| <input type="checkbox"/> Health Sciences           | <input type="checkbox"/> 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:

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# 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](http://www.ECampusTours.com)





# College Fair Guidelines

## 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 out 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](https://secure.californiacolleges.edu/Career_Planning/_default.aspx)

<http://www.discovernursing.com/>

<http://explorecte.com/>

<http://www.whodouwant2b.com/student/pathways>

## 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:

--

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 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


# College Research

## 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.

## 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.

# College Research Worksheet:

	School 1	School 2	School 3	School 4	School 5	School 6	School 7	School 8	School 9	School 10
ME (enter your info here)										
Location: Region, State, City										
Major 1:	Major 1:	Major 1:	Major 1:	Major 1:	Major 1:	Major 1:	Major 1:	Major 1:	Major 1:	Major 1:
Major 2:	Major 2:	Major 2:	Major 2:	Major 2:	Major 2:	Major 2:	Major 2:	Major 2:	Major 2:	Major 2:
Major 3:	Major 3:	Major 3:	Major 3:	Major 3:	Major 3:	Major 3:	Major 3:	Major 3:	Major 3:	Major 3:
Average Test Scores	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:	SAT CR: SAT M: SAT W:
Average GPA	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:	ACT Comp: Unweighted: Weighted:
Type of School: -4-year -Community College -Vocational/Trade - Other										
School Size: Very Large: 20k+ Large: 13k - 20k Medium: 7k- 13k Small: 2k - 7k Very Small: < 2,000										
School Setting: Urban, Suburban, Rural										
Public or Private?										
Gender: All Male, All Female, Coed										
Religious Affiliation:										
Sports:										
Weather:										
Total Cost of Attendance:										



# Compare a Major Across Campuses

## 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

Major Campus Comparison Chart

## 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

## 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?

College Name			
Location			
How large is the major (How many professors? How many students?)			
Concentrations/ Specialties?			
Look at the courses listed for this major. What is one course title/description that you're particularly interested in? Why?			
What is unique about this major at this			

<b>campus? Are there opportunities that are special to this campus?</b>			
<b>Major/Campus Reflection:</b> How do the majors at the various campuses compare? What is most important/valuable to you in this particular major?			

## 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?

## 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

## 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?
- 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

Term	Description
<b>Likely</b>	Your grades and test scores are higher than the average grades and test scores of students admitted at the college.
<b>Target</b>	Your grades and test scores are about the same as the average admitted at the college.
<b>Reach</b>	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.
<b>Lottery</b>	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.
<b>Financial Safety</b>	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.

# 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.



## 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.

## WARM-UP: Why Visit Colleges?

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.

# Prepare for the College Visit: College Research Worksheet

## 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

## 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?

# 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.



## 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.

Where do I go to...	Name of Building or Office
find out about admissions requirements and deadlines?	
get financial aid information?	
pay for classes?	
register for classes?	
get dormitory information?	
find out about student activities?	
learn about study abroad opportunities?	
get student support programs information?	
<i>What other important offices are there on this campus?</i>	

# 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.

# College Visit Checklist

To help you find the right college, fill out one of these forms each time you visit a school.

College Name

City

State

Size

Tuition

Room & Board

Financial Aid Options

## Admissions Contact

Name

Email

Phone

## 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

## The worst part about my visit

**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!



Decide



Cappex.com  
College search made simple.



# Key Information to Gather from the College Visit

## Sample Questions – Admissions

- When is your application deadline?
- Do I need to take an entrance exam (SAT, ACT, etc.)?
- Is there a minimum score required?
- What do I have to do to get accepted?
- How do I increase my odds of getting accepted?
- Do you have to apply for a specific school or program within the university?
- What percent of applicants are accepted?
- How does the need for financial aid figure into the admissions process?

Notes:

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This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and extend across the width of the page. There are no margins, text, or other markings on the paper.

- 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?

Notes:

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## 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:

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## Sample Questions – Other

- What do you do to help students get settled (academically and socially)?

- 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:

## 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

## 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

## 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

## Comparison of Colleges

<b>College #1</b>	<b>College #2</b>
Name:	Name:
<b>Overview</b> – 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?	
<b>Academics</b> – 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?	
<b>Costs</b> – What are the costs to attend? (tuition, room, board, books, etc.) What kinds of financial aid are available?	
<b>Campus Life</b> – 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.

## 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



## 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.

## Comparison of Colleges

<b>College #1</b>	<b>College #2</b>
Name:	Name:
<b>Overview</b> – 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?	
<b>Academics</b> – 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?	
<b>Costs</b> – What are the costs to attend? (tuition, room, board, books, etc.) What kinds of financial aid are available?	
<b>Campus Life</b> – 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: 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..

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.

## 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

## 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.

## Comparison of Colleges

<b>College #1</b>	<b>College #2</b>
Name:	Name:
<b>Overview</b> – 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?	
<b>Academics</b> – 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?	
<b>Costs</b> – What are the costs to attend? (tuition, room, board, books, etc.) What kinds of financial aid are available?	
<b>Campus Life</b> – 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?	

**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

## Materials and Handouts

Why Go To College, Anyway?  
Readings

## Approximate Time Needed:

Two 50 minute sessions

## 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.

## **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.

### 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.

# Making Your Map

How to find information and set your sights on college

**A**ileen 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

**S**tephanie 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

**E**ver 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.



[illegible]

# Why Build a Support Network?

## 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

Read “The Scoop: What’s a Mentor and How Do I Get One?” and watch the videos: “Where should you look for role models?” and “Where can you find a mentor?” on the website: <https://bigfuture.collegeboard.org/get-started/building-support-network>.

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.



## Instructions

Read “The Scoop: What’s a Mentor and How Do I Get One?” and watch the videos: “Where should you look for role models?” and “Where can you find a mentor?” on the website: <https://bigfuture.collegeboard.org/get-started/building-support-network>.

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.



# 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/Build_relationships.html)

[http://www.firstinthefamily.org/highschool/Spread\\_your\\_wings.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 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.

## 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](http://www.firstinthefamily.org/highschool/Build_relationships.html)

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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 can advise you when you need help.

## 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.

Who did you contact?	When did you contact them?	What was their response?

- 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 can advise you when you need help.

Who did you contact?	When did you contact them?	What was their response?

- 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.

Name of Program	Phone Number	Contact Person	Description of Program	Are you interested in joining? Why/Why not?

# First in the Family

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#### 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." - Dejahnae*

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

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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*





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## YOUR HIGH SCHOOL YEARS

### ADVICE ABOUT COLLEGE FROM FIRST-GENERATION STUDENTS



College Years

[Home](#) | [Videos](#) | [Planning Checklists](#) | [Useful Links](#) | [BOOKS](#) | [Downloads for Advisors & Parents](#) | [About Us](#)

## 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*

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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:

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See what's listed for your location on the national directory of college access programs:

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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 out-of-

## 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”.

## 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:

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# First in the Family

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## YOUR HIGH SCHOOL YEARS

### ADVICE ABOUT COLLEGE FROM FIRST-GENERATION STUDENTS



College Years

[Home](#) | [Videos](#) | [Planning Checklists](#) | [Useful Links](#) | [BOOKS](#) | [Downloads for Advisors & Parents](#) | [About Us](#)

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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 out-of-

## Unit Culminating Task: Resources & Opportunities Flyer or Poster

### 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”.



## 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



## 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):

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- A quote from a student or mentor in the program that sums up why it's a useful program.

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/> 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?
  - 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?

## 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

## 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/>)
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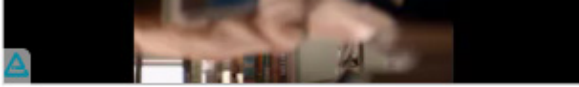
### Part 2:

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?
  - 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?

EDUCATION

# 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.





[www.firstgenerationstudent.com/blog/networking-in-college/](#)


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## 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





Are you a first-generation college student (current or former)? Want to contribute to our blog? We'd love to talk to you! Just [drop us a line](#) and we'll get right back to you.

### AUTHOR INFO



Joshua Rodriguez is a graduate of Pomona College and Garfield High School. He is a son of Salvadoran immigrants and a first generation college graduate. Struggling as a first generation student in college, he became deeply passionate about helping others navigate college and the professional world. He now works for FWD.us where he is helping mobilize the tech community - in Los Angeles - in support of policies that keep the American Dream achievable in the 21st





# **Theme:**

# **Path to College**

# My Graduation Plan

# Graduating from High School: Setting Goals

## 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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## 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:

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

## 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.

Name: **Jose del Campos**

Date: **January 12, 2012**

Teacher: **Ms. Hwang**

Class: **Plan Ahead**

Topic
Truancy

Questions/Main Ideas	Notes
What does “truancy” mean?	Missing school without permission
Why is it a big deal?	Kids who cut school a lot are more likely to drop out (3 out of 4).
	Dropouts -- more likely to be in jail (75%) or murdered (94%)
	It’s actually a law that kids are supposed to be in school.
Why does it matter if I’m late for class?	If you’re more than 30 minutes late, that’s a “tardy.”

Questions/Main Ideas	Notes
	3 tardies = 1 unexcused absence
	3 unexcused absences = legal definition of being "truant"
What happens if a kid is truant?	Parents can get in trouble.
	Parents may have to pay fines or go to jail.
	The D.A.'s office prosecutes parents of habitual truants.
What happens if a parent goes to truancy court?	They can work with the district and court, plead guilty and pay a fine, or plead not guilty and present their case in court.
What happens if they work with the District?	They have to participate in a Parent Responsibility Plan to help their kid get back on track with school.
What if they plead guilty?	They pay a fine and it goes on their criminal record.
Does anything happen to the student if they're truant?	Older students (like us) face consequences.
	Consequences include fines, community service, and losing your driver's license (or delaying getting it).

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## 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

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### 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."

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## 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."

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## 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.”

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## 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.

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## 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.

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## 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.

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## 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:

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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:

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**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.

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**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.

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## 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.

## 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.

## 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

Course/Activity	9th Grade	10th Grade	11th Grade	12th Grade
English ("b")	English 9	English 10	American Lit.	European Lit.
Math ("c")	Geometry (Hon.)	Adv. Alg. (Hon.)	Statistics (AP)	Calculus (AP)
Science ("d")	Biology Hon.	Chemistry (Hon.)	Environmental Science	Physics (AP)
History/Soc. Sci. ("a")		*Modern World (also fulfills g)	US History (AP)	Econ (Fall) US Gov (Spring)
Language Other Than English ("e")	Chinese 1	Chinese 2	Chinese 3	
Visual and Performing Arts ("f")			Art 1 (Fall) Art 2 (Spring)	
Electives ("g")		*Modern World		Journalism
College and Career	Plan Ahead			
Health Education	Health			
Physical Education	PE			
Required Tests		CAHSEE		
College Admissions Tests		Practice PSAT PLAN	PSAT (Fall) SAT (Spring) ACT (Spring)	Re-take SAT (?) SAT Subject Tests
Co-Curricular Activities	Basketball Chinese New Year parade float	Basketball	Basketball Prom Committee	Basketball

# 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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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



## 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.
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.

## Instructions

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).

### Suggested Grade Level:

9

### Materials and Handouts

Planner: Preparing My 4-Year Action Plan  
4-Year Action Plan Worksheet  
Graduating from High School Powerpoint

### Approximate Time Needed:

50 minutes

### 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”.

## 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?

# 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:

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This is a positive goal for me because:

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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:

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## 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:

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th		
12th		

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

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th		
12th		

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

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th		
12th		

4. I need a minimum of three years of social science/history classes. I plan to take:

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th		
12th		

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

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th		
12th		

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

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th		

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12th		

10. In addition to the PSAT, the other college entrance tests I plan to take are:

GRADE	FALL SEMESTER	SPRING SEMESTER
9th		
10th		
11th	PSAT	
12th		

## 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.

Course/Activity	9th Grade	10th Grade	11th Grade	12th Grade
English ("b")				
Math ("c")				
Science ("d")				
History/Soc. Sci. ("a")				
Language Other Than English ("e")				
Visual and Performing Arts ("f")				
Electives ("g")				
College and Career				
Health Education				
Physical Education				
Required Tests				
College Admissions Tests				

Co-Curricular Activities				
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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

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

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

## Types of courses

- Requirements
- Prerequisites
- Honors courses
- AP courses



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

## 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.



## 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?

Subject	1	2	3	4
English	A	A	A	A
Math	A	A	A	A
Science	A	A	A	A
Social Studies	A	A	A	A
Art	A	A	A	A
Music	A	A	A	A
Physical Education	S	S	S	S
Health	S	S	S	S



# Your transcript

SFUSD TRANSCRIPT				SFUSD District Registrar's Office Issued by: March 4, 2010 Sent to:							
Name: State Student ID: 102 Date of Birth: December 21, 1991 Hmrc: 102 Counselor: Grade: 12				Page 1 of 1							
FRESHMAN				JUNIOR							
Course	Mark	Credit	Course	Mark	Credit	Course	Mark				
<b>06 Fall Semester</b> (000) HARPER JUNIOR HIGH SCHOOL 9TH GR ENG 1 B 5.00 LEADERSHIP A 5.00 ALGEBRA 1 B 5.00 PHYS EDUC 1 B 5.00 SPANISH 3 B 5.00 ART 1 A 5.00 ADV CHORUS A 5.00 GPA 3.43 W/O PE 3.50				<b>07 Fall Semester</b> (815) SCHOOL OF THE ARTS 10TH GR ENG 1H B 5.00 GEOMETRY 1 A 5.00 CHEMISTRY 1 C 5.00 SPANISH 5 C 5.00 WORLD ARTS 1 B 5.00 THEA FITNESS 1 A 5.00 BASIC THEA 1 A 5.00 GPA 3.14 W/O PE 3.14				<b>08 Fall Semester</b> (815) SCHOOL OF THE ARTS ENG LANG AP1 B 5.00 US HISTORY/AP B 5.00 PSYCHOLOGY AP 1 B 5.00 ADV ALGEBRA 1 A 5.00 BIOLOGY 1 B 5.00 THEA FITNESS 3 B 5.00 THEA INT 1 B 5.00 GPA 3.14 W/O PE 3.14			
<b>07 Spring Semester</b> (000) HARPER JUNIOR HIGH SCHOOL 9TH GR ENG 2 B 5.00 WORLD GEO B 5.00 ALGEBRA 2 B 5.00 PHYS EDUC 2 D 5.00 SPANISH 4 B 5.00 ART 2 A 5.00 ADV CHORUS A 5.00 GPA 3.00 W/O PE 3.33				<b>08 Spring Semester</b> (815) SCHOOL OF THE ARTS 10TH GR ENG 2H A 5.00 GEOMETRY 2 A 5.00 CHEMISTRY 2 C 5.00 SPANISH 6 B 5.00 WORLD ARTS 2 A 5.00 THEA FITNESS 2 A 5.00 BASIC THEA 2 A 5.00 GPA 3.57 W/O PE 3.57				<b>09 Spring Semester</b> (815) SCHOOL OF THE ARTS ENG LANG AP2 B 5.00 US HISTORY/AP B 5.00 PSYCHOLOGY/AP 2 B 5.00 ADV ALGEBRA 2 B 5.00 BIOLOGY 2 B 5.00 THEA FITNESS 4 B 5.00 THEA INT 1 B 5.00 GPA 3.00 W/O PE 3.00			
SOPHOMORE				SENIOR							
Course	Mark	Credit	Course	Mark	Credit	Course	Mark				
<b>09 Fall Semester</b> (815) SCHOOL OF THE ARTS ENG LIT AP1 A 5.00 US GOV/POL AP1 B 5.00 PHYS EDUC 2 A 5.00 PHYSIOLOGY 1 B 5.00 THEA INT 2 A 10.00 COLLEGE/CAREER A 2.50 GPA 3.69 W/O PE 3.64				<b>09 Summer Semester</b> (000) UC BERKELEY ATDP PHILOSOPHY A 5.00 GPA 4.00 W/O PE 0.00				<b>09 Fall Semester</b> (815) SCHOOL OF THE ARTS ENG LIT AP1 A 5.00 US GOV/POL AP1 B 5.00 PHYS EDUC 2 A 5.00 PHYSIOLOGY 1 B 5.00 THEA INT 2 A 10.00 COLLEGE/CAREER A 2.50 GPA 3.69 W/O PE 3.64			
<h2>SFUSD</h2> <h3>Official Transcript</h3>											
Cumulative G.P.A. Credits Received P.E Included 3.29 P.E excluded 3.32 247.5 227.5 Graduated: No				California High School Exit Examination (CA HSEE) Subject Requirement Test Date English-language Arts Met 2/5/2008 Mathematics Met 2/5/2008							
This transcript is unofficial unless signed by a school official. In no instance is this information to be released to unauthorized recipients.											

# High school graduation requirements prepare you for UC/CSU admissions



The official University of California seal



The official California State University seal

## The a-g subject requirements

A-G Subject Area	A-G Subject Area
English (“b” requirement)	4 Years/40 Credits
Math (“c” requirement)	3 Years/30 Credits
Science (“d” requirement)	2 Years/20 Credits (lab science)
Social Science (“a” requirement)	3 Years/30 Credits
Language Other Than English (“e” requirement)	2 Years/20 Credits (same language)
Visual and Performing Arts (“f” requirement)	1 Year/10 Credits (same subject)
Electives (“g” requirement)	1 Year/10 Credits (advanced course in a-f subject)

Are the classes you are taking a-g?

<http://www.ucop.edu/doorways>

## 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!





## 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.

### Suggested Grade Level:

10, 11

### Materials and Handouts

None

### Approximate Time Needed:

Two 50-minute classes

### 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

## 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

## 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 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](http://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.

## Instructions

Go to [www.collegeboard.com](http://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.

# College Board Website -- Student Organizer

## 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.

## Instructions

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

Test	Grade Level	Where and when is it administered?	Registration	Information	Fee*
PSAT	Optional 10th & 11th	At school In October	Students register at school in early September	Offered in October to any 10th & 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.	\$15 Fee waivers for financially eligible 11th graders (10th graders must pay.)
AP	11th & 12th	At school  The exams are given on specific dates in May: <a href="http://apcentral.collegeboard.com/apc/public/exam/calendar/index.html">http://apcentral.collegeboard.com/apc/public/exam/calendar/index.html</a>	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: <a href="http://www.actstudent.org/register/centers/">http://www.actstudent.org/register/centers/</a>  Recommended testing window: at least	Student must choose test date and register at <a href="http://www.actstudent.org/register/ist/">http://www.actstudent.org/register/ist/</a>	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

		twice between February of 11th grade through November of 12th grade			they choose, the ACT or SAT, we recommend that students take it at least twice.	financially eligible students.
SAT	11th & 12th	<p>Off site: <a href="http://sat.collegeboard.org/register/test-center-code-search">http://sat.collegeboard.org/register/test-center-code-search</a></p> <p>Recommended testing window: at least twice between February of 11th grade through November of 12th grade.</p>	Students must choose test date and register at <a href="http://sat.collegeboard.org/register">http://sat.collegeboard.org/register</a>	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.	SAT: \$43.00 SAT with Essay: \$54.50 2 fee waivers total are available (not 2 per year) for financially eligible students.	
SAT Subject Test		<p>Off site: <a href="http://sat.collegeboard.org/register/test-center-code-search">http://sat.collegeboard.org/register/test-center-code-search</a></p> <p>Tests should be taken in May or June, close to completing the course.</p>	Students must choose test date and register at <a href="http://sat.collegeboard.org/register">http://sat.collegeboard.org/register</a>	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.	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.
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\* 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:

<b>To be exempt from the Entry Level Mathematics test (ELM)</b>	<b>To be exempt from the English Placement Test (EPT)</b>
<ul style="list-style-type: none"> <li>• A score of 550 or above on the mathematics section of the College Board SAT Reasoning Test</li> <li>• A score of 550 or above on a College Board SAT Subject Test in Mathematics (level 1 or level 2)</li> <li>• A score of 23 or above on the American College Testing (ACT) Mathematics Test</li> <li>• A score of 3 or above on the College Board Advanced Placement Calculus AB or Calculus BC exam</li> </ul>	<ul style="list-style-type: none"> <li>• A score of 500 or above on the critical reading section of the College Board SAT Reasoning Test</li> <li>• A score of 22 or above on the American College Testing (ACT) English Test</li> <li>• 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</li> </ul>

<ul style="list-style-type: none"> <li>● A score of 3 or above on the College Board Advanced Placement Statistics examination</li> </ul>	
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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

What are the different tests?

Which ones should I take?

When should I take them?

What dates are they given?

What are the test registration dates?

How and where do I register?

How much do the tests cost?

Are there waivers available?

How should I prepare and practice for the different tests?

Are there different test practicing sites on line?

Are there test prep programs—at school or off-campus?





# **SAT & ACT Overview**

## 2016

# Testing Overview

ACT	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.
SAT	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.
SAT Subject Tests	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.
AP	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.

# **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

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 <b>Subject Tests</b>	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/register/>

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/>
4. Heat Institute in Silicon Valley: [http://lingo.stanford.edu/bigdata/HEAT\\_Institute\\_Stanford\\_2014\\_flyer.pdf](http://lingo.stanford.edu/bigdata/HEAT_Institute_Stanford_2014_flyer.pdf)

**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.

## 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.



## 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/>
4. Heat Institute in Silicon Valley: [http://lingo.stanford.edu/bigdata/HEAT\\_Institute\\_Stanford\\_2014\\_flyer.pdf](http://lingo.stanford.edu/bigdata/HEAT_Institute_Stanford_2014_flyer.pdf)

**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.

## Summer Plan Worksheet

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

Name of program/job:
Description of program/job:
Application requirements (application form, essay, letter of recommendation, etc.):
Due date:
Why are you excited about this program/job?

Name of program/job:
Description of program/job:
Application requirements (application form, essay, letter of recommendation, etc.):
Due date:
Why are you excited about this program/job?

Name of program/job:
Description of program/job:
Application requirements (application form, essay, letter of recommendation, etc.):
Due date:
Why are you excited about this program/job?



## Unit Culminating Task: My Productive Summer Reflection

### Purpose

The purpose of this lesson is for students to synthesize and reflect upon their meaningful summer experiences.

### Suggested Grade Level:

10, 11, 12

### Materials and Handouts

None

### Approximate Time Needed:

Varies

### 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.

## 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



# 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

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](http://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.

## Teacher Resource

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](http://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](http://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?

## Assessment

### 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*

Dream School: <u>UCLA</u>
School's Website: <u>www.ucla.edu</u>
School's Financial Aid Website: <u>www.fao.ucla.edu</u>

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

Adapted from the GLOW Foundation Financial Literacy curriculum.  
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## 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.

## 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*

**Dream School:** \_\_\_\_\_

**School's Website:** \_\_\_\_\_

**School's Financial Aid Website:** \_\_\_\_\_

Components of College Cost:	Estimated Amount \$: (per academic year)	Actual Amount \$: (per academic year)
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
<b>TOTAL</b>	\$	\$

## 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.

## Assessment

### 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> 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.**

Type of Aid:	Source of Aid/How to Apply:	Description:
Scholarships	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!	<b><i>Scholarships are free money—financial aid that doesn’t have to be repaid. Scholarships are usually awarded based on merit.</i></b>
Grants	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.	<b><i>Grants are free money—financial aid that doesn’t have to be repaid. Grants are usually awarded based on financial need.</i></b>
Work Study	Federal work study is administered by schools and paychecks are subsidized by the government.	<b><i>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.</i></b>
Federal loans	Federal loans are funded by the federal government and students must complete FAFSA to qualify.	<b><i>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.</i></b>
Private loans	These loans are made by a lender such as a bank, credit union, state agency, or school; and requires a separate application process.	<b><i>In contrast, private loans are generally more expensive than federal student loans.</i></b>

Adapted from the GLOW Foundation Financial Literacy curriculum.  
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## 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> 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:** \_\_\_\_\_

Type of Aid:	Source of Aid/How to Apply:	Description:
Scholarships	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!	
Grants	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.	
Work Study	Federal work study is administered by schools and paychecks are subsidized by the government.	
Federal loans	Federal loans are funded by the federal government and students must complete FAFSA to qualify.	
Private loans	These loans are made by a lender such as a bank, credit union, state agency, or school; and requires a separate application process.	

## Paying for College Part 3: Student Reflection

### 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

## 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:

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The most helpful piece of information I learned was:

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After today's workshop, I plan to:

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HOMEWORK	PRE-WORK FOR WORKSHOP ON:
Students will discuss their dream college's cost of attendance and financial aid offerings with their parents.	<hr/>

# Case Studies: Funding Their Educations

## 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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## 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?

## 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.

Source	Amount of Money
Grants (Federal and State) and Fee Waivers	\$8,965
Part-Time Job	\$3,500
Summer Job	
Loan from Aunt and Uncle	\$3,500
Total	\$17,442

#### 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.

Source	Amount of Money
Grants (Federal, State, and University)	\$10,572
On-Campus Job	\$2,346
Summer Job	\$800
Scholarship	\$1,000
Student Loan	
Total	\$16,469

### 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.

Source	Amount of Money
Grants (Federal, State, and University)	\$16,700
Scholarship	\$2,500
Parent Contribution	\$5,000
On-Campus Job	\$2,400
Summer Job	\$1,700
Student Loan	
Total	\$31,200

### 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.

Source	Amount of Money
Grants	\$9,910
University Scholarship	\$7,500
Parent Contribution	\$7,500
On-Campus Job	\$2,000
Summer Job	\$1,500
Additional Scholarships	
Total	\$35,300

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?

# College Costs Part 1: Research

## 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.

## 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.

## 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.

Name of School	Tuition/ Fees	Books and Supplies	Room and Board	Transportation	Personal	Other	Total Cost of Attendance
	\$	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$	\$
	\$	\$	\$	\$	\$	\$	\$

### 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

School	Tuition/ Fees	Book and Supplies	Room/ Board*	Health Insurance	Transportation	Personal	Total Cost of Attendance
Community College: Foothill College**	\$1,500	\$1,746	\$11,646	n/a	\$1,278	3,132	<b>\$19,302</b>
SF State University (In-State Resident)	\$6,468	\$1,826	\$13,052	n/a	\$1,496	\$1,364	<b>\$24,206</b>
SF State University (Out-of-State Resident)***	\$15,396	\$1,826	\$13,052	n/a	\$1,496	\$1,364	<b>\$32,756</b>
UC Santa Cruz (In-State Resident)	\$13,398	\$1,440	\$14,730	\$2,415	\$573	\$1,800	<b>\$34,356</b>
UC Santa Cruz (Out-of-State Resident)	\$36,276	\$1,440	\$14,730	\$2,415	\$573	\$1,800	<b>\$57,234</b>
Santa Clara University (Private)	\$43,812	\$1,746	\$12,921	n/a	\$864	\$2,295	<b>\$61,638</b>

\* 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

Type of School	Tuition/ Fees	Book and Supplies	Room/ Board*	Health Insurance	Transportation	Personal/ Misc.	Total Cost of Attendance
Community College: East Los Angeles College (2013-14)	\$1,220	\$1,710	\$11,268	n/a	\$1,323	\$2,844	<b>\$18,365</b>
Cal State L.A. (In-State Resident)	\$6,343	\$1,809	\$12,627	n/a	\$1,389	\$1,365	<b>\$23,533</b>
Cal State L.A. (Out-of-State Resident)	\$15,271	\$1,809	\$12,627	n/a	\$1,389	\$1,365	<b>\$32,461</b>
UCLA (In-State Resident)	\$12,862	\$1,599	\$14,571	\$1,938	\$585	\$1,638	<b>\$ 33,193</b>
UCLA (Out-of-State Resident)	\$35,740	\$1,599	\$14,571	\$1,938	\$585	\$1,638	<b>\$56,071</b>
University of Southern California (Private)**	\$48,347	\$1,500	\$13,334	n/a	\$580	\$1,000	<b>\$64,761</b>

\* Assumes students are living on campus for four-year schools and near campus for community colleges. Students are not living at home and commuting.

## College Costs Part 2: Student Reflection

### 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.



## 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

## 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?

## STUDENT REFLECTION

In today's workshop, I learned about:

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The most helpful piece of information I learned was:

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After today's workshop, I plan to:

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HOMEWORK	PRE-WORK FOR WORKSHOP ON:
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.	

# Financial Aid 101 Part 1:

## Comparing Financial Aid

### 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.

## Assessment

Completion of worksheet.

### 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.

Type of Aid	Advantages	Disadvantages
<b>Scholarships:</b> <u>Free money 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 federal or state aid.</u>	1. Free money 2. Various eligibility criteria – lots of different scholarships available including those for AB540 students 3. Funding may be renewable	1. Can be a complex application process requiring addition supplements (essays, transcript, etc.)
<b>Grants:</b> <u>Free money that covers your college expenses. Grants are awarded based on financial need and multiple grants can be awarded to a student.</u>	1. Free Money 2. Simple application process (generally just FAFSA)	1. Federal grants are not available for AB540 students
<b>Work Study:</b> <u>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.</u>	1. Money does not need to be repaid 2. Convenient work location 3. General flexibility in creating a work schedule 4. Submit FAFSA to apply	1. Less time to focus on academics 2. Funding is not available for AB540 students
<b>Federal Loans:</b> <u>Borrowed money that is repaid with interest. 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.</u>	1. Unlike a job, loans do not require any time commitment other than the application process 2. Generally better interest rate and repayment terms (compared to private loans) 3. Submit FAFSA to apply	1. Money needs to be repaid with interest 2. Funding is not available for AB540 students

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:** \_\_\_\_\_

\_\_\_\_\_

Type of Aid	Advantages	Disadvantages
<b>Scholarships:</b> _____ _____ _____	1.  2.  3.	1.  2.  3.
<b>Grants:</b> _____ _____ _____	1.  2.  3.	1.  2.  3.
<b>Work Study:</b> _____ _____ _____	1.  2.  3.	1.  2.  3.
<b>Federal Loans:</b> _____ _____ _____	1.  2.  3.	1.  2.  3.

When it comes to financial aid, accept \_\_\_\_\_ and \_\_\_\_\_ first, \_\_\_\_\_ second,  
 \_\_\_\_\_ third, \_\_\_\_\_ fourth, and \_\_\_\_\_ last.

## FINANCIAL AID REFERENCE MATERIALS

### SCHOLARSHIPS DEFINED

<b>What is a Scholarship?</b>	Scholarships are <b>free money</b> 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. <b>Prioritize local scholarships</b> as they tend to be less competitive, thereby increasing your chances of being awarded with funding. Remember, legitimate scholarship organizations <b>do not</b> ask for an application fee.
<b>What are the Eligibility Requirements?</b>	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.  AB540 students are eligible to receive scholarships – read the application carefully to ensure that a social security number is not required.
<b>Where Can I Find Scholarships?</b>	Scholarships can be found in a number of places: <sup>35</sup> <sub>17</sub> The internet <sup>35</sup> <sub>17</sub> Visit your college counselor/advisor as many local scholarship opportunities are shared with schools <sup>35</sup> <sub>17</sub> Research local associations, businesses, and organizations <sup>35</sup> <sub>17</sub> Ask your parents if their employer offers any scholarships <sup>35</sup> <sub>17</sub> Check your university's financial aid office to inquire about institutional funding
<b>How do I Apply for Scholarships? What Materials are Needed?</b>	Most scholarships have a general application form and may require additional supplements such as an essay, transcript, or recommendation letter.
<b>What Scholarship Tips Have You Heard?</b>	<ol style="list-style-type: none"> <li>1. <b>Be organized:</b> Stay on top of deadlines, gather all pertinent documents, and make copies of everything you submit.</li> <li>2. <b>Be honest:</b> Don't exaggerate your grades, memberships, skills, or qualifications. It is better to focus on the scholarships for which you might be eligible.</li> <li>3. <b>Proofread your application:</b> 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.</li> <li>4. <b>Be timely:</b> Many scholarship organizations have a firm policy about their deadline. Submit your application as early as possible to ensure it is received on time.</li> </ol>

### Beware of Scholarship Scams!

Never pay money to find, apply, or receive a scholarship. Be on the lookout for:

- <sup>35</sup><sub>17</sub> Companies that guarantee you will receive a scholarship by paying an application or other fee
- <sup>35</sup><sub>17</sub> Websites that charge you for financial aid information that you can access for free
- <sup>35</sup><sub>17</sub> Companies that ask for your financial, credit card, or bank account information

For more information on scholarship scams, visit [www.ftc.gov/scholarshipscams](http://www.ftc.gov/scholarshipscams)



## GRANT COMPARISON TABLE

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

### FEDERAL AND STATE GRANT PROGRAMS

Grant Name	Award Amount	Eligibility	Application Process
Federal Pell Grant	Maximum: \$5,730/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Demonstrate financial need</li> <li>3. For students pursuing their first bachelor's degree</li> </ol>	Submit FAFSA
Federal Supplemental Educational Opportunity Grant (FSEOG)	Maximum: \$4,000/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Demonstrate financial need</li> <li>3. Pell Grant recipients given priority</li> </ol>	Submit FAFSA
Federal TEACH Grant	Maximum: \$4,000/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Be an undergraduate, graduate, or post-baccalaureate student pursuing a teaching career</li> <li>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</li> <li>4. Meet academic requirements</li> </ol>	Submit FAFSA
Cal Grant A	<sup>35</sup> <sub>17</sub> <b>UC:</b> up to \$12,192/year <sup>35</sup> <sub>17</sub> <b>Private:</b> up to \$8,056/year <sup>35</sup> <sub>17</sub> <b>CSU:</b> up to \$5,742/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria</li> <li>2. Be a California resident when you graduated from high school or meet AB540 criteria</li> <li>3. Have a SSN or meet AB540 criteria</li> <li>4. Demonstrate financial need</li> <li>5. Attend a qualifying California college</li> <li>6. Be an undergraduate student</li> <li>7. Meet the 3.0 high school GPA requirement</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2 <sup>nd</sup>
Cal Grant B	Maximum: \$1,473 for year one  Tuition/fee award in the same amount as Cal Grant A after year one.	<ol style="list-style-type: none"> <li>1. Meet criteria 1-6 (from Cal Grant A)</li> <li>2. Meet the 2.0 high school GPA requirement</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2 <sup>nd</sup>
Cal Grant C	Maximum: \$547 for books, tools, or equipment at an occupational or career technical school Maximum: \$2,462 for tuition	<ol style="list-style-type: none"> <li>1. Meet criteria 1-4 (from Cal Grant A)</li> <li>2. For students attending technical or career schools (AA and Certificate programs only)</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and Cal Grant C Supplement Form

## OTHER CALIFORNIA AID PROGRAMS

Grant Name	Award Amount	Eligibility	Application Process
California Chafee Grant	Minimum: \$5,000/year for job training or college up to cost of attendance	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Student was in foster care between ages 16-18</li> <li>3. Be enrolled in school at least half-time</li> </ol>	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	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be nominated by an eligible postsecondary institution or by the employing agency</li> <li>3. Be pursuing a child development permit and plan to work at a licensed children's center in California</li> </ol>	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	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>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</li> </ol>	Submit FAFSA and Law Enforcement Personnel Dependents Grant Application
California National Guard Education Assistance Award Program	<sup>35</sup> <sub>17</sub> <b>UC:</b> up to \$12,192 <sup>35</sup> <sub>17</sub> <b>Private:</b> up to \$12,192 <sup>35</sup> <sub>17</sub> <b>CSU:</b> up to \$5,472 <sup>35</sup> <sub>17</sub> <b>CCC:</b> up to \$1,648	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a California resident</li> <li>3. Have two years of qualifying military service with the California National Guard, State Military Reserve, or Naval Militia</li> <li>4. Minimally enroll in three units/term</li> </ol>	Submit FAFSA and California National Guard Education Assistance Award Program application by June 14
University of California (UC) State Aid	Varies	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a UC undergraduate or graduate student</li> </ol>	Contact your UC's financial aid office
California State University (CSU) Grant	Varies – helps covers CSU tuition fees	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CSU undergraduate or graduate student</li> </ol>	Contact the financial aid office
Educational Opportunity Program (EOP) Grant	Maximum: \$2,000	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CSU undergraduate student admitted through EOP</li> </ol>	Contact the financial aid office
California Community College (CCC) Board of Governor's Fee Waiver	Varies – helps cover registration fees	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CCC student</li> </ol>	Submit FAFSA or fee waiver application – contact the financial aid office
Extended Opportunity Programs and Services (EOPS)	Varies	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CCC student</li> </ol>	Contact the financial aid office
Cooperative Agencies Resources for Education	Varies	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CCC student</li> </ol>	Contact the financial aid office

## FEDERAL WORK STUDY DEFINED

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

<b>What is the Federal Work Study (FWS) Program?</b>	<p>Under the FWS Program, you can work part-time to earn money from the government for your education. The FWS Program:</p> <ul style="list-style-type: none"> <li><sup>35</sup><sub>17</sub> Provides part-time employment while you are enrolled in school</li> <li><sup>35</sup><sub>17</sub> Helps pay your educational expenses</li> <li><sup>35</sup><sub>17</sub> Is available to undergraduate and graduate students who demonstrate financial need</li> <li><sup>35</sup><sub>17</sub> Is available to full-time or part-time students</li> <li><sup>35</sup><sub>17</sub> Is administered by schools participating in the FWS Program</li> <li><sup>35</sup><sub>17</sub> Encourages community service work and work related to your course of study</li> </ul>
<b>Are Federal Work Study Jobs On-Campus or Off-Campus?</b>	<p>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).</p>
<b>How Much Can I Earn?</b>	<p>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.</p> <p><b>Your Total FWS Award Depends On:</b></p> <ul style="list-style-type: none"> <li><sup>35</sup><sub>17</sub> When you apply</li> <li><sup>35</sup><sub>17</sub> Your level of financial need</li> <li><sup>35</sup><sub>17</sub> 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.)</li> </ul>
<b>How Will I Be Paid?</b>	<ul style="list-style-type: none"> <li><sup>35</sup><sub>17</sub> Undergraduate student—by the hour</li> <li><sup>35</sup><sub>17</sub> Your school must pay you at least once a month</li> <li><sup>35</sup><sub>17</sub> 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</li> </ul>
<b>Can I Work as Many Hours as I Want?</b>	<p>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.</p>

## FEDERAL LOAN COMPARISON TABLE

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

	Federal Perkins Loan (Subsidized)	Direct Subsidized Stafford Loan	Direct Unsubsidized Stafford Loan	Parent PLUS Loan
<b>Borrower</b>	Student			Parent of dependent undergraduate student
<b>Eligibility</b>	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
<b>Application Process</b>	Submit FAFSA			Submit FAFSA; Parents complete a Federal PLUS Loan application
<b>Maximum Loan Amount</b>	\$5,500 (for undergraduates)	<b>Dependent Undergraduate:</b> <b>Year One:</b> \$5,500 (up to \$3,500 subsidized, \$2,000 unsubsidized) <b>Year Two:</b> \$6,500 (up to \$4,500 subsidized, \$2,000 unsubsidized) <b>Year Three and Beyond:</b> \$7,500 (up to \$5,500 subsidized, \$2,000 unsubsidized)  <b>Independent Undergraduate:</b> <b>Year One:</b> \$9,500 (up to \$3,500 subsidized, \$6,000 unsubsidized) <b>Year Two:</b> \$10,500 (up to \$4,500 subsidized, \$6,000 unsubsidized) <b>Years Three and up:</b> \$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
<b>Interest Rate</b>	5%; fixed	4.66%; fixed	4.66%; fixed	7.21%; fixed
<b>Grace period</b>	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	Unsubsidized Loans
Loans awarded <b>based on financial need</b> ; the <b>government pays the interest</b> of the loan during college enrollment and the grace period	<b>Interest accrues</b> during college enrollment and the grace period

# Financial Aid 101 Part 2:

## Student Reflection

### Purpose

In this lesson, students reflect upon the advantages and disadvantages of various types of financial aid including scholarships, grants, work study, and loans.

### Suggested Grade Level:

11

### Materials and Handouts

Handout 6 Student Reflection

### Approximate Time Needed:

15 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.

#### 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 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

## 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:

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The most helpful piece of information I learned was:

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After today's workshop, I plan to:

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HOMEWORK	PRE-WORK FOR WORKSHOP ON:
Discuss the financial aid spectrum activity with your parent(s), explaining why certain financial aid is more preferable than others.	



# 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-

## Teacher Resource

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.

## Assessment

Completion of worksheet

### 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](http://www.ftc.gov/scholarshipscams)**

## Instructions

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?**

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**What comes to mind when you hear the word “scholarship”?**

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**Who is eligible to receive a scholarship? How would you go about applying for a scholarship?**

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**Are there any downsides to scholarships?**

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*For more information on scholarship scams, visit [www.ftc.gov/scholarshipscams](http://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.

## 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.

Eligibility Criteria	Response	Notes
What is your GPA?		A strong GPA may qualify you for a number of local and national scholarships.
Do you qualify for free or reduced lunch?		If “Yes,” you may be eligible for other scholarships that take financial need into consideration.
What is your ethnicity?		Many scholarships support students of color.
What is your intended major?		Some scholarships (local, national, and even colleges) support students entering a specific area of study.
What extra-curricular activities have you participated in?		Many scholarships search for well-rounded students who excel outside of the classroom. Scholarship may target leadership, athletic ability, community service, etc.
Which college(s) have you applied to?		Visit your college websites to see if you are eligible for any institutional scholarships.

### Helpful Scholarship Websites:

<b>General Scholarships</b>	<a href="http://www.glowfoundation.org/students/scholarships/scholarships-listing/">www.glowfoundation.org/students/scholarships/scholarships-listing/</a> <a href="http://roybal-allard.house.gov/uploadedfiles/student_resource_guide_2014-2015.pdf">http://roybal-allard.house.gov/uploadedfiles/student_resource_guide_2014-2015.pdf</a> <a href="http://www.fastweb.com">www.fastweb.com</a> <a href="http://bigfuture.collegeboard.org/scholarship-search#!welcome">bigfuture.collegeboard.org/scholarship-search#!welcome</a> <a href="http://www.scholarships.com/financial-aid/college-scholarships/scholarships-by-state/california-scholarships/">www.scholarships.com/financial-aid/college-scholarships/scholarships-by-state/california-scholarships/</a>
<b>Bay Area/ Northern CA Scholarships</b>	<a href="http://siliconvalleycf.org/scholarships">siliconvalleycf.org/scholarships</a> <a href="http://www.eastbayconsortium.org">www.eastbayconsortium.org</a> * click on “Scholarship Directory” <a href="http://www.girlscoutsnorcal.org/girls/scholarships">http://www.girlscoutsnorcal.org/girls/scholarships</a>
<b>Southern California Scholarships</b>	<a href="http://www.heef.org">www.heef.org</a> <a href="http://www.utla.net/scholarships">www.utla.net/scholarships</a> <a href="http://www.rmhcsc.org/scholarships.php">www.rmhcsc.org/scholarships.php</a>
<b>AB540 Scholarships and Resources</b>	<a href="http://www.usc.edu/dept/chepa/pdf/AB%20540%20final.pdf">www.usc.edu/dept/chepa/pdf/AB%20540%20final.pdf</a> <a href="http://www.e4fc.org/images/E4FC_Scholarships.pdf">www.e4fc.org/images/E4FC_Scholarships.pdf</a> <a href="http://www.csac.ca.gov/dream_act.asp">http://www.csac.ca.gov/dream_act.asp</a> <a href="http://www.finaid.org/otheraid/undocumented.phtml">www.finaid.org/otheraid/undocumented.phtml</a> <a href="http://www.maldef.org/assets/pdf/1415_MALDEF_Scholarship.pdf">http://www.maldef.org/assets/pdf/1415_MALDEF_Scholarship.pdf</a>

## 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 your 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,

Teacher Resource

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.

Scholarship Name	Due Date	Website	Materials Needed

### 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.

### Suggested Grade Level:

11

### Materials and Handouts

Student Reflection

### 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.

## 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

## 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:

1. \_\_\_\_\_  
\_\_\_\_\_
2. \_\_\_\_\_  
\_\_\_\_\_
3. \_\_\_\_\_  
\_\_\_\_\_

The most helpful piece of information I learned was:

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After today's workshop, I plan to:

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HOMEWORK	PRE-WORK FOR WORKSHOP ON:
Talk with your parent(s) about what scholarships are and the value of applying early.	<hr/>

## 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".

## 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

## 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.

# Understand and Successfully Complete FAFSA and Other Financial Aid Applications

# Federal Grants and Work Study Part 1: Financial Aid 101

## 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

## Assessment

Completion of worksheet.

### 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 1<sup>st</sup> as possible. California's priority deadline is March 2<sup>nd</sup>.
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**

## 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 1<sup>st</sup> as possible. California's priority deadline is March 2<sup>nd</sup>.
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)

<b>What is the Federal Work Study (FWS) Program?</b>	<p>Under the FWS Program, you can work part-time to earn money from the government for your education. The FWS Program:</p> <ul style="list-style-type: none"> <li><sup>35</sup><sub>17</sub> Provides part-time employment while you are enrolled in school</li> <li><sup>35</sup><sub>17</sub> Helps pay your educational expenses</li> <li><sup>35</sup><sub>17</sub> Is available to undergraduate and graduate students who demonstrate financial need</li> <li><sup>35</sup><sub>17</sub> Is available to full-time or part-time students</li> <li><sup>35</sup><sub>17</sub> Is administered by schools participating in the FWS Program</li> <li><sup>35</sup><sub>17</sub> Encourages community service work and work related to your course of study</li> </ul>
<b>Are Federal Work Study Jobs On-Campus or Off-Campus?</b>	<p>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).</p>
<b>How Much Can I Earn?</b>	<p>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.</p> <p><b>Your Total FWS Award Depends On:</b></p> <ul style="list-style-type: none"> <li><sup>35</sup><sub>17</sub> When you apply</li> <li><sup>35</sup><sub>17</sub> Your level of financial need</li> <li><sup>35</sup><sub>17</sub> 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.)</li> </ul>
<b>How Will I Be Paid?</b>	<ul style="list-style-type: none"> <li><sup>35</sup><sub>17</sub> Undergraduate student—by the hour</li> <li><sup>35</sup><sub>17</sub> Your school must pay you at least once a month</li> <li><sup>35</sup><sub>17</sub> 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</li> </ul>
<b>Can I Work as Many Hours as I Want?</b>	<p>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.</p>

## 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:

## 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

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.

## Assessment

Completion of worksheet.

### 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.

	Federal Pell Grant	Federal Supplemental Educational Opportunity Grant (FSEOG)	Federal TEACH Grant	Federal Work Study (FWS)
Is the money free, earned, or borrowed?	<i>Free money</i>	<i>Free money</i>	<i>Free money</i>	<i>Earned money</i>
Where does the money come from?	<i>Federally funded</i>	<i>Federally funded</i>	<i>Federally funded</i>	<i>Federally funded</i>
How much is the award?	<i>Maximum: \$5,730/year</i>	<i>Maximum: \$4,000/year</i>	<i>Maximum: \$4,000/year</i>	<i>Award amount varies depending on when you apply, level of financial need, and amount of funds available</i>
How do you apply?	<i>Complete the FAFSA to apply</i>	<i>Complete the FAFSA to apply</i>	<i>Complete the FAFSA to apply</i>	<i>Complete the FAFSA to apply</i>
What are the general eligibility requirements?	<i>U.S. citizen or other eligible resident Need-based</i>	<i>U.S. citizen or other eligible resident Need-based</i>	<i>U.S. citizen or other eligible resident Need-based</i>	<i>U.S. citizen or other eligible resident Need-based</i>
Can you get more than one?	<i>No</i>	<i>NO</i>	<i>No</i>	<i>No, you hold one work study position at a time</i>

**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 1<sup>st</sup> each year and should be submitted online by March 2<sup>nd</sup>. In California, undocumented students should complete the California Dream Act Application to apply for state and university grants, fee waivers, and scholarships.

## 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.

	Federal Pell Grant	Federal Supplemental Educational Opportunity Grant (FSEOG)	Federal TEACH Grant	Federal Work Study (FWS)
Is the money free, earned, or borrowed?				
Where does the money come from?				
How much is the award?				
How do you apply?				
What are the general eligibility requirements?				
Can you get more than one?				

**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?**

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## FINANCIAL AID REFERENCE MATERIALS

### FEDERAL AND STATE GRANT PROGRAMS

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

Grant Name	Award Amount	Eligibility	Application Process
Federal Pell Grant	Maximum: \$5,730/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Demonstrate financial need</li> <li>3. For students pursuing their first bachelor's degree</li> </ol>	Submit FAFSA
Federal Supplemental Educational Opportunity Grant (FSEOG)	Maximum: \$4,000/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Demonstrate financial need</li> <li>3. Pell Grant recipients given priority</li> </ol>	Submit FAFSA
Federal TEACH Grant	Maximum: \$4,000/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Be an undergraduate, graduate, or post-baccalaureate student pursuing a teaching career</li> <li>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</li> <li>4. Meet academic requirements</li> </ol>	Submit FAFSA
Cal Grant A	<sup>35</sup> <sub>17</sub> <b>UC:</b> up to \$12,192/year <sup>35</sup> <sub>17</sub> <b>Private:</b> up to \$8,056/year <sup>35</sup> <sub>17</sub> <b>CSU:</b> up to \$5,472/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria</li> <li>2. Be a California resident when you graduated from high school or meet AB540 criteria</li> <li>3. Have a SSN or meet AB540 criteria</li> <li>4. Demonstrate financial need</li> <li>5. Attend a qualifying California college</li> <li>6. Be an undergraduate student</li> <li>7. Meet the 3.0 high school GPA requirement</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2 <sup>nd</sup>
Cal Grant B	Maximum: \$1,473 for year one  Tuition/fee award in the same amount as Cal Grant A after year one.	<ol style="list-style-type: none"> <li>1. Meet criteria 1-6 (from Cal Grant A)</li> <li>2. Meet the 2.0 high school GPA requirement</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2 <sup>nd</sup>
Cal Grant C	Maximum: \$547 for books, tools, or equipment at an occupational or career technical school Maximum: \$2,462 for tuition	<ol style="list-style-type: none"> <li>1. Meet criteria 1-4 (from Cal Grant A)</li> <li>2. For students attending technical or career schools (AA and Certificate programs only)</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and Cal Grant C Supplement Form

## OTHER CALIFORNIA AID PROGRAMS

Grant Name	Award Amount	Eligibility	Application Process
California Chafee Grant	Minimum: \$5,000/year for job training or college up to cost of attendance	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Student was in foster care between ages 16-18</li> <li>3. Be enrolled in school at least half-time</li> </ol>	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	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be nominated by an eligible postsecondary institution or by the employing agency</li> <li>3. Be pursuing a child development permit and plan to work at a licensed children's center in California</li> </ol>	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	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>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</li> </ol>	Submit FAFSA and Law Enforcement Personnel Dependents Grant Application
California National Guard Education Assistance Award Program	<sup>35</sup> <sub>17</sub> <b>UC:</b> up to \$12,192 <sup>35</sup> <sub>17</sub> <b>Private:</b> up to \$12,192 <sup>35</sup> <sub>17</sub> <b>CSU:</b> up to \$5,472 <sup>35</sup> <sub>17</sub> <b>CCC:</b> up to \$1,648	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a California resident</li> <li>3. Have two years of qualifying military service with the California National Guard, State Military Reserve, or Naval Militia</li> <li>4. Minimally enroll in three units/term</li> </ol>	Submit FAFSA and California National Guard Education Assistance Award Program application by June 14
University of California (UC) State Aid	Varies	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a UC undergraduate or graduate student</li> </ol>	Contact your UC's financial aid office
California State University (CSU) Grant	Varies – helps covers CSU tuition fees	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CSU undergraduate or graduate student</li> </ol>	Contact the financial aid office
Educational Opportunity Program (EOP) Grant	Maximum: \$2,000	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CSU undergraduate student admitted through EOP</li> </ol>	Contact the financial aid office
California Community College (CCC) Board of Governor's Fee Waiver	Varies – helps cover registration fees	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CCC student</li> </ol>	Submit FAFSA or fee waiver application – contact the financial aid office
Extended Opportunity Programs and Services (EOPS)	Varies	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CCC student</li> </ol>	Contact the financial aid office
Cooperative Agencies Resources for Education	Varies	<ol style="list-style-type: none"> <li>1. Demonstrate financial need</li> <li>2. Be a CCC student</li> </ol>	Contact the financial aid office

## FAFSA: OVERVIEW

Source: [www.fafsa.ed.gov](http://www.fafsa.ed.gov)



### 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:

- <sup>35</sup><sub>17</sub> are a U.S. citizen, U.S. national, or eligible non-citizen,
- <sup>35</sup><sub>17</sub> are attending a participating college or school,
- <sup>35</sup><sub>17</sub> are pursuing a degree or certificate in an eligible program and making academic progress,
- <sup>35</sup><sub>17</sub> 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](http://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 1<sup>st</sup> as possible. Check your college websites to see their priority deadline. As a general benchmark, submit your FAFSA by March 2<sup>nd</sup> if you live in California.

# Cal Grants and Dream Act/FAFSA Part 1:

## Introduction to Cal Grants

### 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:

## 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.

## Assessment

### 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 be 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 2<sup>nd</sup> priority deadline.

## 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)

\_\_\_\_\_

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Who is eligible to receive a Cal Grant? How would you go about applying for a Cal Grant?

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## CAL GRANT AWARDS AND AMOUNTS

Source: [www.calgrants.org](http://www.calgrants.org) and [www.csac.ca.gov](http://www.csac.ca.gov)

	<b>Entitlement Award</b>	<b>Competitive Award</b>
	For high schools seniors, recent high school graduates, or students who recently received their GED who meet the eligibility requirements and applied by the priority deadline.	For students who are not eligible for entitlement awards. Major difference is Competitive Awards are not guaranteed.
Cal Grant A	<p><b>Covers tuition and fees</b> at public and private colleges. Students must have a <b>minimum high school GPA of 3.0</b> 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.</p> <p><sup>35</sup><sub>17</sub> Maximum award amount for a CSU: \$5,472</p> <p><sup>35</sup><sub>17</sub> For a UC: \$12,192</p> <p><sup>35</sup><sub>17</sub> For a private school: \$8,056</p>	For students from low-to-middle income families with a <b>minimum high school GPA of 3.0</b> . Awards (in the same amount as the Entitlement Award) help pay for <b>tuition and fees</b> at qualifying schools with academic programs of at least two years long.
Cal Grant B	<p>The award provides low-income students with a <b>minimum high school GPA of 2.0</b> with a <b>living allowance</b> and <b>assistance with tuition and fees</b>. Awards can be used for two-year, four-year, and certificate programs.</p> <p><sup>35</sup><sub>17</sub> Most recipients are awarded a \$1,473 stipend for books and living expenses regardless of the school he/she attends.</p> <p><sup>35</sup><sub>17</sub> After freshmen year, Cal Grant B covers tuition and fees in the same amount as Cal Grant A.</p>	<p>For low-income students with a <b>minimum high school GPA of 2.0</b>. Awards (in the same amount as the Entitlement Award) help pay <b>for tuition, fees, and access costs</b> at qualifying schools with programs at least one year in length.</p> <p><sup>35</sup><sub>17</sub> In year one, funds can be only be used for access costs such as living expenses, transportation, supplies, and books.</p> <p><sup>35</sup><sub>17</sub> In year two, the award can be put towards tuition and fees at qualifying schools.</p>
Cal Grant C	n/a	<p>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 <b>tuition, fees, books and supplies at occupational or career technical schools</b>. 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.</p> <p><sup>35</sup><sub>17</sub> \$547 award is available for books, tools, or equipment.</p> <p><sup>35</sup><sub>17</sub> Student may receive an additional \$2,462 for tuition at a school other than a CCC.</p>

**NOTE:** To claim a Cal Grant Award, the student's high school graduation date must be verified.

<sup>35</sup><sub>17</sub> The student's high school or college attending can verify this

<sup>35</sup><sub>17</sub> 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

Grant Name	Award Amount	Eligibility	Application Process
Federal Pell Grant	Maximum: \$5,730/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Demonstrate financial need</li> <li>3. For students pursuing their first bachelor's degree</li> </ol>	Submit FAFSA
Federal Supplemental Educational Opportunity Grant (FSEOG)	Maximum: \$4,000/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Demonstrate financial need</li> <li>3. Pell Grant recipients given priority</li> </ol>	Submit FAFSA
Federal TEACH Grant	Maximum: \$4,000/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen or conditional alien</li> <li>2. Be an undergraduate, graduate, or post-baccalaureate student pursuing a teaching career</li> <li>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</li> <li>4. Meet academic requirements</li> </ol>	Submit FAFSA
Cal Grant A	<sup>35</sup> <sub>17</sub> <b>UC:</b> up to \$12,192/year <sup>35</sup> <sub>17</sub> <b>Private:</b> up to \$8,056/year <sup>35</sup> <sub>17</sub> <b>CSU:</b> up to \$5,472/year	<ol style="list-style-type: none"> <li>1. Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria</li> <li>2. Be a California resident when you graduated from high school or meet AB540 criteria</li> <li>3. Have a SSN or meet AB540 criteria</li> <li>4. Demonstrate financial need</li> <li>5. Attend a qualifying California college</li> <li>6. Be an undergraduate student</li> <li>7. Meet the 3.0 high school GPA requirement</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2 <sup>nd</sup>
Cal Grant B	Maximum: \$1,473 for year one  Tuition/fee award in the same amount as Cal Grant A after year one.	<ol style="list-style-type: none"> <li>1. Meet criteria 1-6 (from Cal Grant A)</li> <li>2. Meet the 2.0 high school GPA requirement</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and GPA Verification form by Mar. 2 <sup>nd</sup>
Cal Grant C	Maximum: \$547 for books, tools, or equipment at an occupational or career technical school Maximum: \$2,462 for tuition	<ol style="list-style-type: none"> <li>1. Meet criteria 1-4 (from Cal Grant A)</li> <li>2. For students attending technical or career schools (AA and Certificate programs only)</li> </ol>	Submit FAFSA (Dream Application for AB540 students) and Cal Grant C Supplement Form

## Cal Grants and Dream Act/FAFSA Part 2: Financial Aid Comparison 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:

1. FAFSA ([www.fafsa.ed.gov](http://www.fafsa.ed.gov)) OR California Dream Act Application (<https://dream.csac.ca.gov>)
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
- Official website is [www.fafsa.ed.gov](http://www.fafsa.ed.gov) – not [www.fafsa.com](http://www.fafsa.com)

## 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.

## Assessment

### 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.

	FAFSA	California Dream Act Application
<b>Why is this application important?</b>	<i>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.</i>	<i>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.</i>
<b>What are the general eligibility requirements?</b>	<p><i>Submit a FAFSA if you:</i></p> <ul style="list-style-type: none"> <li><i>are a U.S. citizen, U.S. national, or eligible non-citizen,</i></li> <li><i>are attending a participating college or school,</i></li> <li><i>are pursuing a degree or certificate in an eligible program and making academic progress,</i></li> <li><i>and have financial need – be safe and apply for FAFSA as you may qualify for federal programs</i></li> </ul>	<p><i>Complete a California Dream Act Application if you are a non-resident or undocumented student who:</i></p> <ul style="list-style-type: none"> <li><i>Attended a California high school for 3+ years</i></li> <li><i>Is or will be graduating from a California high school or equivalent</i></li> <li><i>Plans to enroll in a qualifying institution of higher education in California</i></li> <li><i>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</i></li> <li><i>Demonstrates financial need</i></li> </ul>
<b>How much it cost to file this application?</b>	<i>Free</i>	<i>Free</i>
<b>Where do I find the application?</b>	<i>Completing the application is the best option: <a href="http://www.fafsa.ed.gov">www.fafsa.ed.gov</a></i>	<i>Completing the application is the best option: <a href="https://dream.csac.ca.gov/">https://dream.csac.ca.gov/</a></i>
<b>When should I complete and submit my application by?</b>	<i>March 2<sup>nd</sup> – to increase your chances of getting federal and state aid including Cal Grants</i>	<i>March 2<sup>nd</sup> – to increase your chances of getting aid including Cal Grants</i>
<b>Can you complete this application and the FAFSA/California Dream Act Application?</b>	<i>No</i>	<i>No</i>

## 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.

	FAFSA	California Dream Act Application
Why is this application important?		
What are the general eligibility requirements?		
How much it cost to file this application?		
Where do I find the application?		
When should I complete and submit my application by?		
Can you complete this application and the FAFSA/California Dream Act Application?		



## CAL GRANTS OVERVIEW

Source: [www.calgrants.org](http://www.calgrants.org) and [www.csac.ca.gov](http://www.csac.ca.gov)

<b>What is a Cal Grant?</b>	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 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 <a href="http://www.calgrants.org">www.calgrants.org</a> .
<b>What are the Eligibility Criteria:</b>	<sup>35</sup> <sub>17</sub> 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 <sup>35</sup> <sub>17</sub> Be a U.S. citizen, eligible non-citizen, or meet AB540 criteria ( <i>see below</i> ) <sup>35</sup> <sub>17</sub> Be a California resident when you graduated from high school or meet AB540 criteria <sup>35</sup> <sub>17</sub> Have a Social Security number or meet AB540 criteria <sup>35</sup> <sub>17</sub> Attend a qualifying California college <sup>35</sup> <sub>17</sub> Be an undergraduate student; be enrolled at least half-time in a program leading to an undergraduate degree or certificate <sup>35</sup> <sub>17</sub> Have financial need based on your college costs and have family income/assets below the established ceilings (For new applicants: <a href="http://www.csac.ca.gov/facts/2014-15_income_ceilings_new_apps_renewing_recips.pdf">http://www.csac.ca.gov/facts/2014-15_income_ceilings_new_apps_renewing_recips.pdf</a> ) <sup>35</sup> <sub>17</sub> Meet any minimum GPA requirements <sup>35</sup> <sub>17</sub> Have registered with U.S. Selective Service (most males) <sup>35</sup> <sub>17</sub> Not owe a refund on a state or federal grant or be in default on a student loan
<b>How Do I Apply for a Cal Grant?</b>	Submit two materials: 1. FAFSA ( <a href="http://www.fafsa.ed.gov">www.fafsa.ed.gov</a> ) OR California Dream Act Application ( <a href="https://dream.csac.ca.gov">https://dream.csac.ca.gov</a> ) 2. Verified Cal Grant GPA by the deadline (check with your school to learn how they do this)
<b>When is the Application Deadline?</b>	You can apply as early as January 1 <sup>st</sup> with a priority deadline of March 2 <sup>nd</sup> . You are encouraged to apply by this date to maximize your award amount – awards become more limited after this date.

### AB540 criteria:

- <sup>35</sup>
- <sub>17</sub>
- Attend a California high school for 3+ years
- 
- <sup>35</sup>
- <sub>17</sub>
- Have or be will graduating from a California high school or equivalent
- 
- <sup>35</sup>
- <sub>17</sub>
- Plan to enroll in a qualifying institution of higher education in California
- 
- <sup>35</sup>
- <sub>17</sub>
- 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
- 
- <sup>35</sup>
- <sub>17</sub>
- Demonstrate financial need

## FAFSA: OVERVIEW

Source: [www.fafsa.ed.gov](http://www.fafsa.ed.gov)

The image is a screenshot of the FAFSA website homepage. At the top, there is a navigation bar with links for Home, About Us, PIN Site, StudentAid.gov, and Help. The main heading reads "Get help paying for college" with a subheading "Submit a Free Application for Federal Student Aid (FAFSA)". Below this is a banner image showing four diverse students. Under the banner, there are two main sections: "New to the FAFSA?" with a "Start A New FAFSA" button, and "Returning User?" with a list of options (Make a correction, Add a school, View your Student Aid Report (SAR), and more...) and a "Login" button. The website is branded with "Federal Student Aid" and "FAFSA" logos.

### 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:

- <sup>35</sup><sub>17</sub> are a U.S. citizen, U.S. national, or eligible non-citizen,
- <sup>35</sup><sub>17</sub> are attending a participating college or school,
- <sup>35</sup><sub>17</sub> are pursuing a degree or certificate in an eligible program and making academic progress,
- <sup>35</sup><sub>17</sub> 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](http://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 1<sup>st</sup> as possible. Check your college websites to see their priority deadline. As a general benchmark, submit your FAFSA by March 2<sup>nd</sup> 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](http://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

## 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.

<https://dream.csac.ca.gov>  
 Click to go forward, hold to see history

[Home](#)
[CA.GOV](#)
[CSAC.CA.GOV](#)
[Privacy Policy](#)
[Help](#)

# CA DREAM ACT

## Apply by March 2, 2015

**Questions about types of CA Dream Act financial aid?**

- Wondering if you are a CA Dreamer?
- AB 540 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**

Select this option if you:

- Have never filed a California Dream Application
- Want to start a new California Dream Application
- Are ready to get started

[Start Dream](#)

**Provide a Parent Signature**

Select this option if you:

- Need to request Parent PIN
- Forgot your Parent PIN
- Need to sign your child's application

[Sign Student](#)

**California Dream Act Application Login**

Select this option if you want to:

- Continue or renew your CA Dream Application
- Update or correct current CA Dream Application
- View your Student Aid Report (SAR) and more...

[Login To](#)

## CALIFORNIA DREAM ACT APPLICATION: OVERVIEW

Source: [www.csac.ca.gov](http://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:

<sup>35</sup><sub>17</sub> **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.

<sup>35</sup><sub>17</sub> **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](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:

- <sup>35</sup><sub>17</sub> Attended a California high school for 3+ years
- <sup>35</sup><sub>17</sub> Is or will be graduating from a California high school or equivalent
- <sup>35</sup><sub>17</sub> Plans to enroll in a qualifying institution of higher education in California
- <sup>35</sup><sub>17</sub> 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
- <sup>35</sup><sub>17</sub> 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 1<sup>st</sup> as possible. As a general benchmark, submit your application by March 2<sup>nd</sup> 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:

- <sup>35</sup><sub>17</sub> 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.)
- <sup>35</sup><sub>17</sub> Current bank statements (if applicable)
- <sup>35</sup><sub>17</sub> Current investment statements (if applicable)
- <sup>35</sup><sub>17</sub> Current records of child support paid (if applicable)
- <sup>35</sup><sub>17</sub> Current business and/or farm records (if applicable)

For a list of other Frequently Asked Questions, visit:

[http://www.csac.ca.gov/pubs/forms/grnt\\_frm/2014-15\\_california\\_dream\\_application\\_instructions.pdf](http://www.csac.ca.gov/pubs/forms/grnt_frm/2014-15_california_dream_application_instructions.pdf)

<i>California Dream Application</i>	<b>2014 - 2015</b> <b>Worksheet for the</b> <b>California Dream Act Application</b> <a href="http://www.CalDreamAct.org">www.CalDreamAct.org</a>	 <b>CALIFORNIA STUDENT AID COMMISSION</b>
<b>Do Not Mail this Worksheet</b>		
<p>The California Dream Act Application is the financial aid application for AB 540 eligible students. Complete this worksheet before completing the Dream Act Application to make sure you have all of the information you will need to complete the Dream Act Application. Complete application instructions and the Dream Act Application are online at <a href="http://www.caldreamact.org">www.caldreamact.org</a>. Be sure to complete the correct year's application. Use the 2014-15 application for 2014-15 academic year financial assistance.</p>		
<p>The California Dream Act Application can only be completed by students who meet the following qualifications:</p> <ul style="list-style-type: none"><li>Students who <u>cannot</u> file the Free Application for Federal Student Aid (FAFSA), and who also</li><li>Attended at least three full years in a California public or private high school, and who also</li><li>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</li><li>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.</li></ul>		
<p>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 <a href="http://www.caldreamact.org">www.caldreamact.org</a>. The California Student Aid Commission processes the Dream Act Application. Any financial aid received can only be used at eligible California institutions.</p> <p>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.</p>		

## 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 2<sup>nd</sup> 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/>.
2. **File Early:** Do your best to submit the FAFSA or Dream Act Application prior to the March 2<sup>nd</sup> 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 your 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 sent 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](http://webgrants4students.org)).

If you have any questions, e-mail [studentsupport@csac.ca.gov](mailto:studentsupport@csac.ca.gov) or call 888-CA-GRANT (888-224-7268)



# FAFSA Overview

## 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.

## Suggested Grade Level:

12

## Materials and Handouts

[www.fafsa.gov](http://www.fafsa.gov)  
FAFSA Getting Ready  
Tips for Applying For A Cal Grant

## Approximate Time Needed:

60 minutes

## 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

## 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

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**Federal Student Aid**  
An OFFICE of the U.S. DEPARTMENT of EDUCATION

 Home

About Us



**Get help paying for college**

## New to the FAFSA?

## Returning User?

- **Make a correction**
- **Add a school**
- **View your Student Aid Report (SAR), and more...**

**Login**

## Deadlines

### Information about your deadlines.

School Code Search

**Find your college's school code. Also find detailed information about your college.**

## FAFSA Filing Options

Learn about the other options for filing your FAFSA.

## Thinking About College?

A small, square inset photograph showing a person from behind, sitting at a desk and working on a laptop. The person has dark hair and is wearing a dark top. The laptop screen is open and displays some content. The background is slightly blurred, showing what appears to be a desk with other items.

Use FAFSA4caster to see how federal student aid can help you pay for college!

Check out how Federal Student Aid can put you on a path to success.  
[View Videos on YouTube](#) or  
[Download the Accessible Videos](#)

## FAFSA: GETTING READY

Plan to submit the FAFSA as close as possible to the January 1<sup>st</sup> 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](http://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.

- <sup>35</sup><sub>17</sub> 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)
- <sup>35</sup><sub>17</sub> 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).
- <sup>35</sup><sub>17</sub> Driver's license number (if applicable)
- <sup>35</sup><sub>17</sub> Alien Registration or Permanent Resident Card (if not a U.S. citizen)
- <sup>35</sup><sub>17</sub> 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 1<sup>st</sup>, you can quickly copy the information directly into the FAFSA.

## FAFSA on the Web Worksheet

[www.fafsa.gov](http://www.fafsa.gov)

## 2014 – 2015

Federal Student Aid | PROUD SPONSOR of the AMERICAN MIND®  
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### DO NOT MAIL THIS WORKSHEET.

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<sup>SM</sup>) 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*.**

APPLICATION DEADLINES

Federal Deadline - June 30, 2015  
State Aid Deadlines - See below.

Check with your financial aid administrator for these states and territories:  
AL, AS \*, AZ, CO, FM \*, GA, GU \*, HI \*, MH \*, MP \*, NE, NM, NV \*, PR, PW \*, SD \*, TX, UT, VA \*, VI \*, WI and WY \*.

Pay attention to the symbols that may be listed after your state deadline.

AK	AK Education Grant and AK Performance Scholarship - June 30, 2014
AR	Academic Challenge - June 1, 2014 ( <i>date received</i> ) Workforce Grant - Contact the financial aid office. Higher Education Opportunity Grant - June 1, 2014 ( <i>date received</i> )
CA	Initial awards - March 2, 2014 + * Additional community college awards - September 2, 2014 ( <i>date postmarked</i> ) + *
CT	February 15, 2014 ( <i>date received</i> ) # *
DC	April 1, 2014 ( <i>date received</i> ) * For priority consideration, submit application by April 30, 2014. For DCTAG, complete the DC OneApp and submit additional supporting documents on or before April 30, 2014.
DE	April 15, 2014 ( <i>date received</i> )
FL	May 15, 2014 ( <i>date processed</i> )
IA	July 1, 2014 ( <i>date received</i> ); earlier priority deadlines may exist for certain programs. *
ID	Opportunity Grant - March 1, 2014 ( <i>date received</i> ) # *
IL	As soon as possible after January 1, 2014. Awards made until



## TIPS FOR APPLYING FOR A CAL GRANT

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# Understanding Federal Loans: Loan Reflection

## 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.

## 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:

<u>debt</u>	<u>fear</u>	<u>stressed</u>
<u>predatory</u>	<u>borrow</u>	<u>bills</u>
<u>interest</u>	<u>subsidized/ unsubsidized</u>	<u>credit</u>

**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.



## 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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# Understanding Federal Loans: Federal v. Private Loans

## 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.

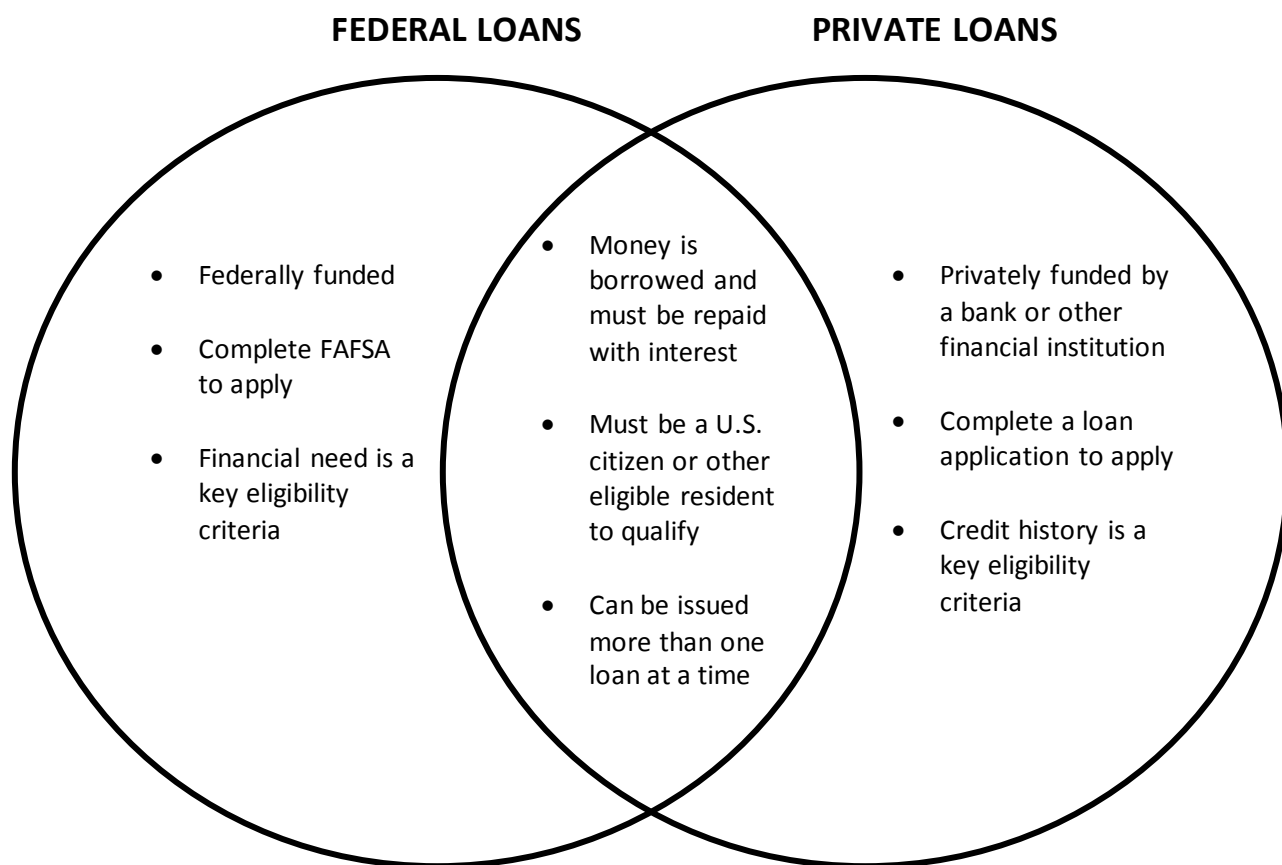
If needed, refer to the “Loan Terminology” handout

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.



How might a federal loan be *more* advantageous than a private loan?

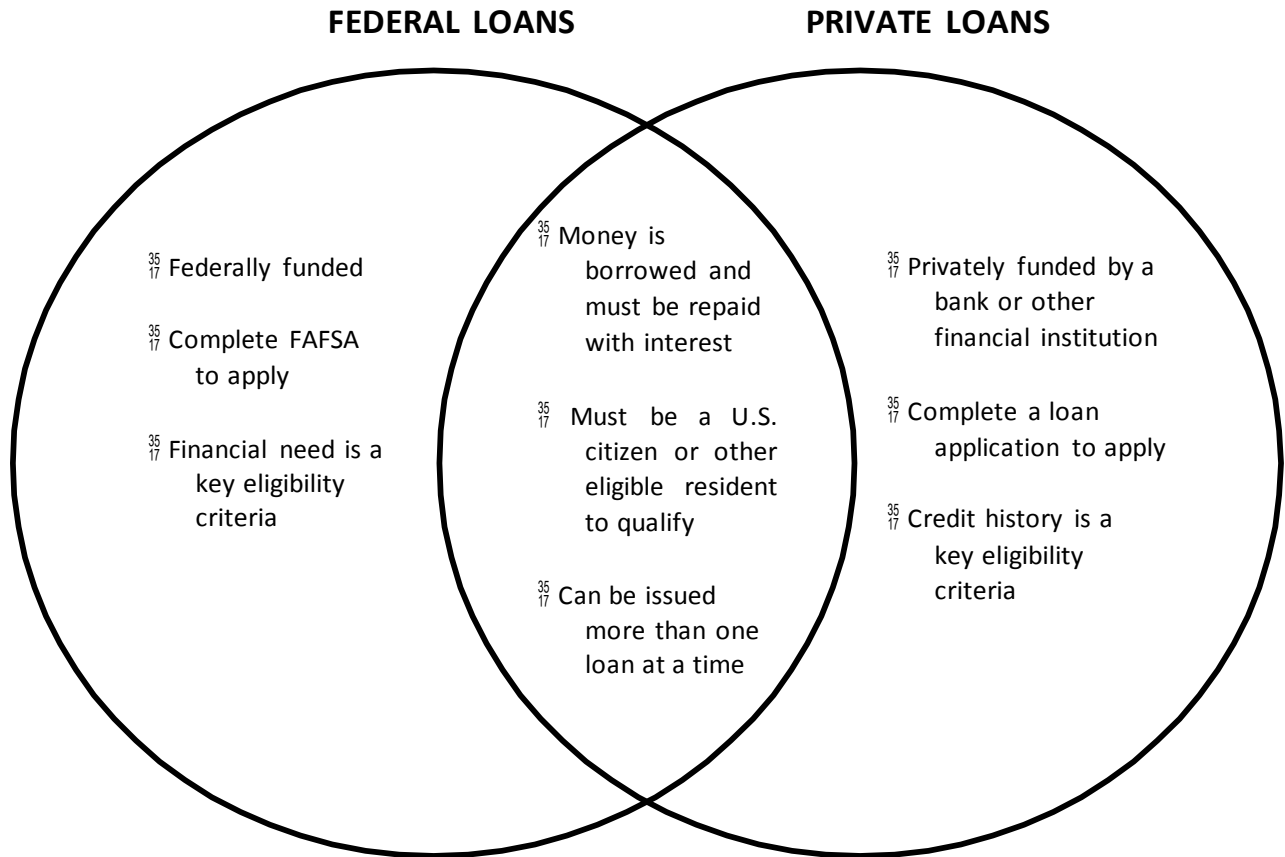
1. Interest rates are often lower and at fixed rates
2. More flexible repayment options
3. No credit needed – federal loans are awarded based on financial need
4. Most federal loans have a grace period of six months after graduation

## 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.



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 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

# 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.”



## Teacher Resource

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.

## Assessment

### 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%).

## 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.

## 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).

<b>What is the interest rate?</b> <b>What other fees or costs are associated with the loan?</b>	Loans can have varied interest rates (the percentage of interest changes annually) or fixed (constant) rates. In general, <b><i>federal loans offer lower, fixed interest rates</i></b> (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.)
<b>Is the loan subsidized or unsubsidized?</b>	<b>Subsidized Loans:</b> Loans awarded <b><i>based on financial need</i></b> ; the <b><i>government pays the interest</i></b> of the loan during college enrollment and the grace period.  <b>Unsubsidized Loans:</b> 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.
<b>What are the repayment terms?</b>	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. <b><i>The amount you pay each month depends on the size of your loan, your repayment term, and interest rate.</i></b> 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.
<b>How much should you borrow?</b>	<b><i>Borrow only what you need</i></b> and what you can afford to repay in the future <i>after</i> accepting all other financial aid (grants, scholarships) you qualify for that does not need to be repaid.
<b>What happens if you are unable to make payments?</b> <b>Are there deferment or forbearance options?</b>	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.

### 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?

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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?

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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?

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## FEDERAL LOAN COMPARISON TABLE

Source: [www.studentaid.ed.gov](http://www.studentaid.ed.gov)

	Federal Perkins Loan (Subsidized)	Direct Subsidized Stafford Loan	Direct Unsubsidized Stafford Loan	Parent PLUS Loan
<b>Borrower</b>	Student			Parent of dependent undergraduate student
<b>Eligibility</b>	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
<b>Application Process</b>	Submit FAFSA			Submit FAFSA; Parents complete a Federal PLUS Loan application
<b>Maximum Loan Amount</b>	\$5,500 (for undergraduates)	<b>Dependent Undergraduate:</b> <b>Year One:</b> \$5,500 (up to \$3,500 subsidized, \$2,000 unsubsidized) <b>Year Two:</b> \$6,500 (up to \$4,500 subsidized, \$2,000 unsubsidized) <b>Year Three and Beyond:</b> \$7,500 (up to \$5,500 subsidized, \$2,000 unsubsidized)  <b>Independent Undergraduate:</b> <b>Year One:</b> \$9,500 (up to \$3,500 subsidized, \$6,000 unsubsidized) <b>Year Two:</b> \$10,500 (up to \$4,500 subsidized, \$6,000 unsubsidized) <b>Years Three and up:</b> \$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
<b>Interest Rate</b>	5%; fixed	4.66%; fixed	4.66%; fixed	7.21%; fixed
<b>Grace period</b>	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	Unsubsidized Loans
Loans awarded <b>based on financial need</b> ; the <b>government pays the interest</b> of the loan during college enrollment and the grace period	<b>Interest accrues</b> during college enrollment and the grace period

## LOAN REPAYMENT TABLE

Source: [www.finaid.org/calculators](http://www.finaid.org/calculators)

Amount Borrowed	Loan Term	Interest Rate							
		5%		6%		6.80%		7%	
		Monthly Payments	Total Payments	Monthly Payments	Total Payments	Monthly Payments	Total Payments	Monthly Payments	Total Payments
\$1,000	10	\$10.61	\$1,272.79	\$11.10	\$1,332.25	\$11.51	\$1,380.96	\$11.61	\$1,393.30
	15	\$7.91	\$1,423.43	\$8.44	\$1,518.94	\$8.88	\$1,597.83	\$8.99	\$1,617.89
	20	\$6.60	\$1,583.89	\$7.16	\$1,719.43	\$7.63	\$1,832.01	\$7.75	\$1,860.72
	25	\$5.85	\$1,753.77	\$6.44	\$1,932.90	\$6.94	\$2,082.22	\$7.07	\$2,120.34
	30	\$5.37	\$1,932.56	\$6.00	\$2,158.38	\$6.52	\$2,346.93	\$6.65	\$2,395.09
\$2,000	10	\$21.21	\$2,545.57	\$22.20	\$2,664.49	\$23.02	\$2,761.93	\$23.22	\$2,786.60
	15	\$15.82	\$2,846.86	\$16.88	\$3,037.88	\$17.75	\$3,195.66	\$17.98	\$3,235.78
	20	\$13.20	\$3,167.79	\$14.33	\$3,438.87	\$15.27	\$3,664.03	\$15.51	\$3,721.43
	25	\$11.69	\$3,507.54	\$12.89	\$3,865.81	\$13.88	\$4,164.43	\$14.14	\$4,240.68
	30	\$10.74	\$3,865.12	\$11.99	\$4,316.76	\$13.04	\$4,693.86	\$13.31	\$4,790.18
\$3,000	10	\$31.82	\$3,818.36	\$33.31	\$3,996.74	\$34.52	\$4,142.89	\$34.83	\$4,179.91
	15	\$23.72	\$4,270.29	\$25.32	\$4,556.83	\$26.63	\$4,793.49	\$26.96	\$4,853.67
	20	\$19.80	\$4,751.68	\$21.49	\$5,158.30	\$22.90	\$5,496.04	\$23.26	\$5,582.15
	25	\$17.54	\$5,261.31	\$19.33	\$5,798.71	\$20.82	\$6,246.65	\$21.20	\$6,361.01
	30	\$16.10	\$5,797.67	\$17.99	\$6,475.15	\$19.56	\$7,040.79	\$19.96	\$7,185.27
\$4,000	10	\$42.43	\$5,091.14	\$44.41	\$5,328.98	\$46.03	\$5,523.86	\$46.44	\$5,573.21
	15	\$31.63	\$5,693.71	\$33.75	\$6,075.77	\$35.51	\$6,391.32	\$35.95	\$6,471.56
	20	\$26.40	\$6,335.58	\$28.66	\$6,877.74	\$30.53	\$7,328.06	\$31.01	\$7,442.87
	25	\$23.38	\$7,015.08	\$25.77	\$7,731.62	\$27.76	\$8,328.87	\$28.27	\$8,481.35
	30	\$21.47	\$7,730.23	\$23.98	\$8,633.53	\$26.08	\$9,387.72	\$26.61	\$9,580.36
\$5,000	10	\$53.03	\$6,363.93	\$55.51	\$6,661.23	\$57.54	\$6,904.82	\$58.05	\$6,966.51
	15	\$39.54	\$7,117.14	\$42.19	\$7,594.71	\$44.38	\$7,989.16	\$44.94	\$8,089.45
	20	\$33.00	\$7,919.47	\$35.82	\$8,597.17	\$38.17	\$9,160.07	\$38.76	\$9,303.59
	25	\$29.23	\$8,768.85	\$32.22	\$9,664.52	\$34.70	\$10,411.08	\$35.34	\$10,601.69
	30	\$26.84	\$9,662.79	\$29.98	\$10,791.91	\$32.60	\$11,734.65	\$33.27	\$11,975.44
\$6,000	10	\$63.64	\$7,636.72	\$66.61	\$7,993.48	\$69.05	\$8,285.78	\$69.67	\$8,359.81
	15	\$47.45	\$8,540.57	\$50.63	\$9,113.65	\$53.26	\$9,586.99	\$53.93	\$9,707.35
	20	\$39.60	\$9,503.36	\$42.99	\$10,316.61	\$45.80	\$10,992.09	\$46.52	\$11,164.30
	25	\$35.08	\$10,522.62	\$38.66	\$11,597.43	\$41.64	\$12,493.30	\$42.41	\$12,722.03
	30	\$32.21	\$11,595.35	\$35.97	\$12,950.29	\$39.12	\$14,081.58	\$39.92	\$14,370.53

## 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

## 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](http://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 1<sup>st</sup> 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.

## 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.

## Assessment

Completion of FAFSA (Screenshot of submission or Student Aid Report as verification)

### 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.

Section Number	Section Focus	Student or Parent Information?
1	<b>Student: Basic Information</b> <i>Questions include name, address, SSN, citizenship, marital status, selective service, drug conviction(s), parent education level, and college information.</i>	Student
2	<b>Student: Dependency Status</b> <i>Answering “yes” to any of these questions categorizes the student as an “independent.” They are NOT required to provide parent information.</i>	Student
3	<b>Parent: Financial Information</b> <i>Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</i>	Parent – Section is in purple
4	<b>Student: Financial Information</b> <i>Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</i>	Student

**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](http://www.fafsa.ed.gov) or (2) mailing in a paper application. There are many advantages to completing the FAFSA online including:

<b>Convenience</b>	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.
<b>IRS Data Retrieval Tool</b>	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.
<b>Skip Logic</b>	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.
<b>Electronic Signing</b>	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.
<b>Number of Colleges</b>	Students can enter up to ten schools at once compared to four on the paper FAFSA.



## 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.

Section Number	Section Focus	Student or Parent Information?
1		
2		
3		
4		

**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](http://www.fafsa.ed.gov) or (2) mailing in a paper application. There are many advantages to completing the FAFSA online including:

<b>Convenience</b>	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.
<b>IRS Data Retrieval Tool</b>	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.
<b>Skip Logic</b>	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.
<b>Electronic Signing</b>	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.
<b>Number of Colleges</b>	Students can enter up to ten schools at once compared to four on the paper FAFSA.

## 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?

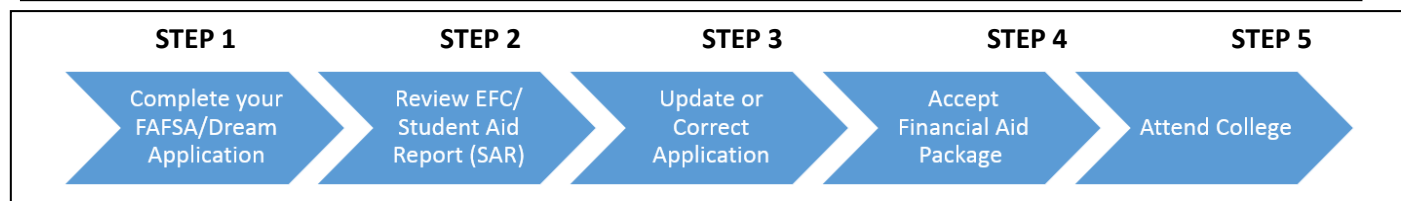
- Talk to the high school college counselor
- For California students: Attend a Cash for College Workshop ([www.californiacashforcollege.org](http://www.californiacashforcollege.org))
- Visit the FAFSA website ([www.fafsa.ed.gov](http://www.fafsa.ed.gov))
- Contact the U.S. Department of Education at 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 1<sup>st</sup>, 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 to 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.



# FAFSA on the Web Worksheet

www.fafsa.gov

2014 – 2015

Federal Student Aid  
An Office of the U.S. Department of Education

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## DO NOT MAIL THIS WORKSHEET.

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<sup>SM</sup>) 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:

#### APPLICATION DEADLINES

Federal Deadline - June 30, 2015

State Aid Deadlines - See below.

Check with your financial aid administrator for these states and territories:

AL, AS \*, AZ, CO, FM \*, GA, GU \*, HI \*, MH \*, MP \*, NE, NM, NV \*, PR, PW \*, SD \*, TX, UT, VA \*, VI \*, WI and WY \*.

**Pay attention to the symbols that may be listed after your state deadline.**

AK	AK Education Grant and AK Performance Scholarship - June 30, 2014
AR	Academic Challenge - June 1, 2014 ( <i>date received</i> ) Workforce Grant - Contact the financial aid office. Higher Education Opportunity Grant - June 1, 2014 ( <i>date received</i> )
CA	Initial awards - March 2, 2014 + * Additional community college awards - September 2, 2014 ( <i>date postmarked</i> ) + *
CT	February 15, 2014 ( <i>date received</i> ) # *
DC	April 1, 2014 ( <i>date received</i> ) * For priority consideration, submit application by April 30, 2014. For DCTAG, complete the DC OneApp and submit additional supporting documents on or before April 30, 2014.
DE	April 15, 2014 ( <i>date received</i> )
FL	May 15, 2014 ( <i>date processed</i> )
IA	July 1, 2014 ( <i>date received</i> ); earlier priority deadlines may exist for certain programs. *
ID	Opportunity Grant - March 1, 2014 ( <i>date received</i> ) # *
IL	As soon as possible after January 1, 2014. Awards made until funds are depleted.
IN	March 10, 2014 ( <i>date received</i> )
KS	April 1, 2014 ( <i>date received</i> ) # *
KY	As soon as possible after January 1, 2014. Awards made until funds are depleted.
LA	June 30, 2015 (July 1, 2014 recommended)
MA	May 1, 2014 ( <i>date received</i> ) #
MD	March 1, 2014 ( <i>date received</i> )
ME	May 1, 2014 ( <i>date received</i> )
MI	March 1, 2014 ( <i>date received</i> )
MN	30 days after term starts ( <i>date received</i> )
MO	April 1, 2014 ( <i>date received</i> )
MS	MTAG and MESG Grants - September 15, 2014 ( <i>date received</i> ) HELP Scholarship - March 31, 2014 ( <i>date received</i> )
MT	March 1, 2014 ( <i>date received</i> ) #
NC	As soon as possible after January 1, 2014. Awards made until funds are depleted.
ND	April 15, 2014 ( <i>date received</i> ) # Early priority deadlines may exist for institutional programs.
NH	NH is not offering a state grant this year.
NJ	2013-2014 Tuition Aid Grant recipients - June 1, 2014 ( <i>date received</i> ) All other applicants - October 1, 2014, fall & spring terms ( <i>date received</i> ) - March 1, 2015, spring term only ( <i>date received</i> ) June 30, 2015 ( <i>date received</i> ) *
NY	October 1, 2014 ( <i>date received</i> )
OH	March 1, 2014 ( <i>date received</i> ) #
OK	March 1, 2014 ( <i>date received</i> ) #
OR	OSAC Private Scholarships - March 1, 2014 Oregon Opportunity Grant - February 1, 2014
PA	All first-time applicants at a community college; a business/ trade/technical school; a hospital school of nursing; or enrolled in a non-transferable two-year program - August 1, 2014 ( <i>date received</i> ) All other applicants - May 1, 2014 ( <i>date received</i> )
RI	March 1, 2014 ( <i>date received</i> ) #
SC	Tuition Grants - June 30, 2014 ( <i>date received</i> ) SC Commission on Higher Education Need-based Grants - As soon as possible after January 1, 2014. Awards made until funds are depleted.
TN	State Grant - Prior-year recipients receive award if eligible and apply by March 1, 2014. All other awards made to neediest applicants who apply by March 1, 2014, until funds are depleted. State Lottery - fall term, September 1, 2014 ( <i>date received</i> ); spring & summer terms, February 1, 2015 ( <i>date received</i> )
VT	As soon as possible after January 1, 2014. Awards made until funds are depleted. *
WA	As soon as possible after January 1, 2014. Awards made until funds are depleted.
WV	PROMISE Scholarship - March 1, 2014. New applicants must also submit additional application at <a href="http://www.cfwv.com">www.cfwv.com</a> . Contact your financial aid administrator or your state agency. WV Higher Education Grant Program - April 15, 2014

# For priority consideration, submit application by date specified.

+ Applicants encouraged to obtain proof of mailing.

\* Additional form may be required.

STATE AID DEADLINES

Federal Student Aid logo 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.

Student's Last Name	First Name	Social Security Number																		
<b>Student Citizenship Status</b> (check one of the following) <input type="checkbox"/> U.S. citizen (U.S. national) <input type="checkbox"/> Neither citizen nor eligible noncitizen <input type="checkbox"/> Eligible noncitizen (Enter your Alien Registration Number in the box to the right.) <b>Generally, you are an eligible noncitizen if you are:</b> <ul style="list-style-type: none"><li>• A permanent U.S. resident with a Permanent Resident Card (I-551);</li><li>• A conditional permanent resident with a Conditional Green Card (I-551C);</li><li>• 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</li><li>• 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."</li></ul>																				
		<b>Your Alien Registration Number</b> <table border="1" style="display: inline-table; text-align: center; width: 150px;"><tr><td>A</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>	A																	
A																				
<b>Student Marital Status</b> (check one of the following) <input type="checkbox"/> Single <input type="checkbox"/> Married or remarried <input type="checkbox"/> Separated <input type="checkbox"/> Divorced or widowed <b>You will be asked to provide information about your spouse if you are married or remarried.</b>																				
<b>Selective Service Registration</b> If you are male and 25 or younger, you can use the FAFSA to register with Selective Service.																				
<b>Student Aid Eligibility Drug Convictions</b> <input type="checkbox"/> I have never attended college <input type="checkbox"/> I have never received federal student aid <input type="checkbox"/> I have never had a drug conviction <b>If you did not check any of these boxes, you will be asked more questions online.</b>																				
<table border="0" style="width: 100%;"><tr><td style="width: 40%;"><b>What is the highest school parent 1 completed?</b></td><td style="width: 30%;"><input type="checkbox"/> Middle school/Jr. high <input type="checkbox"/> High school</td><td style="width: 30%;"><input type="checkbox"/> College or beyond <input type="checkbox"/> Other/unknown</td></tr><tr><td><b>What is the highest school parent 2 completed?</b></td><td><input type="checkbox"/> Middle school/Jr. high <input type="checkbox"/> High school</td><td><input type="checkbox"/> College or beyond <input type="checkbox"/> Other/unknown</td></tr></table>			<b>What is the highest school parent 1 completed?</b>	<input type="checkbox"/> Middle school/Jr. high <input type="checkbox"/> High school	<input type="checkbox"/> College or beyond <input type="checkbox"/> Other/unknown	<b>What is the highest school parent 2 completed?</b>	<input type="checkbox"/> Middle school/Jr. high <input type="checkbox"/> High school	<input type="checkbox"/> College or beyond <input type="checkbox"/> Other/unknown												
<b>What is the highest school parent 1 completed?</b>	<input type="checkbox"/> Middle school/Jr. high <input type="checkbox"/> High school	<input type="checkbox"/> College or beyond <input type="checkbox"/> Other/unknown																		
<b>What is the highest school parent 2 completed?</b>	<input type="checkbox"/> Middle school/Jr. high <input type="checkbox"/> High school	<input type="checkbox"/> College or beyond <input type="checkbox"/> 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.

<input type="checkbox"/> I was born before January 1, 1991	<input type="checkbox"/> I am married	<input type="checkbox"/> I will be working on a master's or doctorate program (e.g., MA, MBA, MD, JD, PhD, EdD, graduate certificate)	
<input type="checkbox"/> I am serving on active duty in the U.S. Armed Forces	<input type="checkbox"/> I am a veteran of the U.S. Armed Forces	<input type="checkbox"/> 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	
<input type="checkbox"/> Since I turned age 13, both of my parents were deceased	<input type="checkbox"/> I was in foster care since turning age 13	<input type="checkbox"/> I have dependents (other than children or my spouse) who live with me and I provide more than half of their support	
<input type="checkbox"/> I was a dependent or ward of the court since turning age 13	<input type="checkbox"/> I am currently or I was an emancipated minor	<input type="checkbox"/> I am currently or I was in legal guardianship	<input type="checkbox"/> 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.

\$

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 know?

If you file a tax return with the IRS, you 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, you may be able to view your tax return information and securely transfer it into *FAFSA on the Web*.

### 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.

\$

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?

- ☐ 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. Once online, 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

- ☐ 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
- ☐ 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](http://www.fafsa.gov) to complete and submit your application.**

For more information on federal student aid, visit [StudentAid.gov](http://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

### 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

## 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.

## 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.

Section Number	Section Focus	Student or Parent Information?
1	<b>Student: Basic Information</b> <i>Questions include name, citizenship status, marital status, gender, and parent education level</i>	Student
2	<b>Student: Dependency Status</b> <i>Answering “yes” to any of these questions categorizes the student as an “independent.” They are NOT required to provide parent information.</i>	Student
3	<b>Parent: Financial Information</b> <i>Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</i>	Parent
4	<b>Student: Financial Information</b> <i>Questions focus on tax completion, gross income and earnings, untaxed income, and federal program benefits.</i>	Student

**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:

<b>Convenience</b>	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.
<b>Skip Logic</b>	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.
<b>Electronic Signing</b>	Students and parents can use a PIN to sign the Dream Application. Alternatively, a signature page can be used in place of a PIN.

## 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.

## 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.

Section Number	Section Focus	Student or Parent Information?
1		
2		
3		
4		

**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:

<b>Convenience</b>	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.
<b>Skip Logic</b>	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.
<b>Electronic Signing</b>	Students and parents can use a PIN to sign the Dream Application. Alternatively, a signature page can be used in place of a PIN.

## CALIFORNIA DREAM ACT AND APPLICATION FAQs

Source: [http://www.csac.ca.gov/pubs/forms/grnt\\_frm/cal\\_grant\\_dream\\_act\\_faqs.pdf](http://www.csac.ca.gov/pubs/forms/grnt_frm/cal_grant_dream_act_faqs.pdf)

### 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.

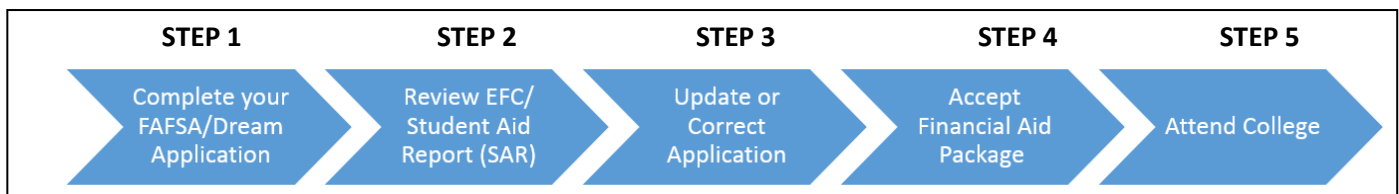
For additional information related to the California Dream Act Application, visit:

[http://www.csac.ca.gov/pubs/forms/grnt\\_frm/2014-15\\_california\\_dream\\_application\\_instructions.pdf](http://www.csac.ca.gov/pubs/forms/grnt_frm/2014-15_california_dream_application_instructions.pdf)

## 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 1<sup>st</sup>, 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 to 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.



## Do Not Mail this Worksheet

The California Dream Act Application is the financial aid application for AB 540 eligible students. Complete this worksheet before completing the Dream Act Application to make sure you have all of the information you will need to complete the Dream Act Application. Complete application instructions and the Dream Act Application are online at [www.caldreamact.org](http://www.caldreamact.org). Be sure to complete the correct year's application. Use the 2014-15 application for 2014-15 academic year financial assistance.

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](http://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](http://www.fafsa.gov). Students should not complete both applications.

### Need Help?

For help with getting answers for this worksheet, go to  
[www.caldreamact.org](http://www.caldreamact.org), [caldreamact@csac.ca.gov](mailto:caldreamact@csac.ca.gov)  
or call 888-224-7268, 10:00 am to 4:45 pm., Monday through Friday

### 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](http://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](http://www.caldreamact.org). This is the fastest and easiest way to apply for aid.

### Using Your Tax Return

If you (or your parents) will file a 2013 income tax return with the Internal Revenue Service (IRS), we recommend that you complete it before filling out the Dream Act Application. If you have not completed your return yet, you can still submit your Dream Act Application now using estimated tax information and then correct that information after you file your return. Do not miss any of your colleges' deadlines. If you or your parents will file an income tax return, you will need the tax returns and/or W-2 forms to complete the Dream Act Application.

### Filling out the Dream Application

If you or your family have unusual circumstances that might affect your financial situation, such as loss of employment, complete this form to the extent you can. Then, submit it as instructed and consult with the financial aid office at the college you plan to attend.

After you complete this worksheet, go online to [www.caldreamact.org](http://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](http://www.caldreamact.org). If you would like to make changes to your Dream Act Application, log-in at [www.caldreamact.org](http://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](http://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****First Name****Middle Initial**

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.

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.

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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 not a citizen or eligible noncitizen.
- ☐ I am an eligible noncitizen.  
(Read Below)

Alien Registration Number (If you have one)

A

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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](http://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](http://www.sss.gov) to find out if you need to register.

Some financial aid is offered based on the level of schooling your parents completed.

- 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.**

<input type="checkbox"/> I was born before January 1, 1991	<input type="checkbox"/> I am married	<input type="checkbox"/> In 2014-15, I will be working on a master's or doctorate program (e.g. MA, MBA, MD, JD, PhD, EdD), graduate certificate	
<input type="checkbox"/> I am serving on active duty in the U.S. Armed Forces	<input type="checkbox"/> I am a veteran of the U.S. Armed Forces	<input type="checkbox"/> I have children and I provide more than half of their support	
<input type="checkbox"/> Both of my parents are deceased	<input type="checkbox"/> I was in foster care at any time since turning age 13	<input type="checkbox"/> I have dependents (other than children or my spouse) who live with me and I provide more than half of their support	
<input type="checkbox"/> I was a dependent or ward of the court at any time since turning age 13	<input type="checkbox"/> I am currently or I was an emancipated minor	<input type="checkbox"/> I am currently or I was in a legal guardianship	<input type="checkbox"/> I am homeless or I am at risk of being homeless

**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

☐ Check here if Parent 1 is a dislocated worker

**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

☐ Check here if Parent 2 is a dislocated worker

**Did your parents file or will they file a 2013 income tax return?**

- ☐ My parents have already completed a tax return  
 If your parents will file a 2013 income tax return, they will need their tax returns and/or W-2 forms to complete the Dream Act Application.
- ☐ My parents will file, but have not yet completed a tax return
- ☐ My parents are not going to file an income tax return

If your parents will not be filing an income tax return, they will enter the total the wages they have earned from working during 2013.

**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)      ☐ CalWorks
- ☐ Cal Fresh      ☐ Special Supplemental Nutrition Program for Women, Infants and Children (WIC)
- ☐ 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?**

\$

☐ 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

**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)

☐ CalWorks

☐ Cal Fresh

☐ Special Supplemental Nutrition Program for Women, Infants and Children (WIC)

☐ 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 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](http://www.caldreamact.org).**

**NOTES:**

**Do not mail this Worksheet. Go to [www.caldreamact.org](http://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.

# 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:

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.

## Assessment

Completion of worksheet

### 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)

1. <b>Student Name or Student ID number</b>	2. <b>Parent PLUS Loan</b>
3. <b>Cal Grant A, B, or C</b>	4. Hourly wage offered for Federal Work Study
5. <b>Award amounts for each type of aid offered</b>	6. <b>Federal Perkins Loan</b>
7. <b>Federal Stafford Unsubsidized Loan</b>	8. Number of hours you will work per week (if you decided to accept work study)
9. <b>The total amount of aid offered by term (semester or quarter)</b>	10. Outside scholarships you have received
11. <b>Cost of Attendance (COA)</b>	12. Intended area of study/Major
13. <b>Federal Pell Grant</b>	14. <b>The total amount of aid offered for the academic year</b>
15. Outside scholarships you have applied to (independent scholarships not offered to you from the school)	16. <b>Federal Stafford Subsidized Loan</b>
17. <b>Federal Work Study</b>	18. <b>A section where you can decline the award</b>
19. <b>Unmet Need (The difference between your financial need and COA)</b>	20. The total award offer for all four years of college
21. <b>Expected Financial Contribution (EFC)</b>	22. <b>Your Financial Need: COA - EFC</b>
23. <b>University or Institutional Grants</b>	24. Estimated monthly payment for each loan offered

**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.

## 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:** \_\_\_\_\_

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**Which of the following items might you see on a financial aid award letter?** *(Circle all that apply)*

1. Student Name or Student ID number	2. Parent PLUS Loan
3. Cal Grant A, B, or C	4. Hourly wage offered for Federal Work Study
5. Award amounts for each type of aid offered	6. Federal Perkins Loan
7. Federal Stafford Unsubsidized Loan	8. Number of hours you will work per week (if you decided to accept work study)
9. The total amount of aid offered by term (semester or quarter)	10. Outside scholarships you have received
11. Cost of Attendance (COA)	12. Intended area of study/Major
13. Federal Pell Grant	14. The total amount of aid offered for the academic year
15. Outside scholarships you have applied to (independent scholarships not offered to you from the school)	16. Federal Stafford Subsidized Loan
17. Federal Work Study	18. A section where you can decline the award
19. Unmet Need (The difference between your financial need and COA)	20. The total award offer for all four years of college
21. Expected Financial Contribution (EFC)	22. Your Financial Need: COA - EFC
23. University or Institutional Grants	24. Estimated monthly payment for each loan offered

**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

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.

## Assessment

### 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

## 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. \_\_\_\_\_

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:

<b>Cost of Attendance (COA):</b>	\$
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):	\$
<b>Financial Aid Award Letter Total: (Sum A-E)*</b>	\$
<b>Financial Gap/Unmet Need Total (COA-Financial Aid Award Letter Total): (Subtract Financial Aid Award Letter Total from COA)</b>	\$

\* 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 are Formatted 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:	<p><sup>35</sup><sub>17</sub> What expenses are included in this cost of attendance? Expenses that are not included will increase the cost of attendance.</p> <p><sup>35</sup><sub>17</sub> What deadlines do I need to be aware of?</p>
Scholarships:	<p><sup>35</sup><sub>17</sub> 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?</p> <p><sup>35</sup><sub>17</sub> Are the institutional scholarships offered renewable and if so, what are the requirements for maintaining my eligibility?</p>
Grants:	<p><sup>35</sup><sub>17</sub> Is the funding renewable and if so, what are the requirements for maintaining my eligibility?</p> <p><sup>35</sup><sub>17</sub> If tuition increases, will this aid also increase?</p> <p><sup>35</sup><sub>17</sub> What are the requirements to maintain this aid? Are there enrollment (full time/part-time) or GPA requirements?</p> <p><sup>35</sup><sub>17</sub> How can I maintain the same level of grants after my first year?</p>
Work Study:	<p><sup>35</sup><sub>17</sub> How many hours per week, month, quarter or semester will I be working?</p> <p><sup>35</sup><sub>17</sub> Do I have this amount of time in my schedule to allocate to a job?</p> <p><sup>35</sup><sub>17</sub> What is the hourly wage?</p> <p><sup>35</sup><sub>17</sub> Can that hourly pay increase with experience?</p> <p><sup>35</sup><sub>17</sub> What types of jobs are available and how do I go about securing one of these positions?</p>
Loans:	<p><sup>35</sup><sub>17</sub> What is the interest rate? Is it fixed or variable?</p> <p><sup>35</sup><sub>17</sub> What are the terms and conditions of the loan?</p> <p><sup>35</sup><sub>17</sub> Are there other fees associated with the loan?</p> <p><sup>35</sup><sub>17</sub> What might your total loan amount look like in four years (assuming you borrow approximately the same amount each year)?</p> <p><sup>35</sup><sub>17</sub> What would your monthly payments look like?</p>
Financial Gap:	<p><sup>35</sup><sub>17</sub> 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.</p> <p><sup>35</sup><sub>17</sub> If your financial aid does not cover the cost of attendance, how will you either reduce your expenses or increase your income?</p> <ul style="list-style-type: none"> <li>○ Will you need to pull more out of your savings or ask your parents to contribute more?</li> <li>○ Will you need to get a part-time job? Remember, you will be balancing this with school.</li> <li>○ Can you reduce expenses or attend a less expensive college?</li> <li>○ Are you able to borrow more? Before accepting any loan, know the terms and conditions as well as research the repayment options.</li> </ul>

**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 Ucsd  
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.

## Assessment

### 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:**

	School A: <i>CSU Chico</i>	School B: <i>Trinity University</i>
Cost of Attendance (COA):	\$22,414	\$50,550
Free Money Total (e.g. Grants, Scholarships):	\$15,350	\$32,565
Earned Money Total (e.g. Federal Work Study):	\$3,500	\$0
Subsidized Loan Total (e.g. Federal Perkins, Federal Stafford/Direct Loan):	\$3,358	\$7,500
Unsubsidized Loan Total (e.g. Federal Stafford/Direct Loan):	\$0	\$2,000
Parent Loan Total (e.g. Parent PLUS Loan):	\$0	\$0
Financial Aid Award Letter Total:	\$22,208	\$42,065
Financial Gap/Unmet Need Total (COA-Financial Aid Award Letter Total):	\$206	\$8,485

**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.

## 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:

	School A:	School B:
Cost of Attendance (COA):	\$ _____	\$ _____
Free Money Total (e.g. Grants, Scholarships):	\$ _____	\$ _____
Earned Money Total (e.g. Federal Work Study):	\$ _____	\$ _____
Subsidized Loan Total (e.g. Federal Perkins, Federal Stafford/Direct Loan):	\$ _____	\$ _____
Unsubsidized Loan Total (e.g. Federal Stafford/Direct Loan):	\$ _____	\$ _____
Parent Loan Total (e.g. Parent PLUS Loan):	\$ _____	\$ _____
Financial Aid Award Letter Total:	\$ _____	\$ _____
Financial Gap/Unmet Need Total (COA-Financial Aid Award Letter Total):	\$ _____	\$ _____

4. Which college offers a better financial aid package? \_\_\_\_\_

## SAMPLE FINANCIAL AID AWARD LETTER: TRINITY UNIVERSITY



Office of Financial Aid  
One Trinity Place  
San Antonio, TX 78212-7200  
Phone: 210-999-8315  
Fax: 210-999-8316

### FINANCIAL AID AWARD LETTER

June 02, 2014

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.

AWARD	FALL	SPRING	TOTAL
<b>SCHOLARSHIPS/GRANTS</b>			
Federal Pell Grant	\$2,740.00	\$2,740.00	\$5,480.00
Federal SEOG	\$1,000.00	\$1,000.00	\$2,000.00
Dean's Academic Scholarship	\$5,000.00	\$5,000.00	\$10,000.00
Trinity University Grant	\$7,543.00	\$7,542.00	\$15,085.00
<b>LOANS</b>			
Federal Perkins Loan	\$2,000.00	\$2,000.00	\$4,000.00
Federal Direct Subsidized Loan	\$1,750.00	\$1,750.00	\$3,500.00
Federal Direct Unsubsidized Loan	\$1,000.00	\$1,000.00	\$2,000.00

<b>AWARD AMOUNT</b>	<b>\$21,033.00</b>	<b>\$21,032.00</b>	<b>\$42,065.00</b>
---------------------	--------------------	--------------------	--------------------

- 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:

Tuition and Fees	\$36,214.00
Living Allowance	\$11,936.00
Books and Supplies Allowance	\$1,000.00
Personal and Transportation Allowance	\$1,400.00
<b>TOTAL</b>	<b>\$50,550.00</b>

## SAMPLE FINANCIAL AID AWARD LETTER: UC SANTA CRUZ

### 2014-15 UNDERGRADUATE BUDGETS - FALL, WINTER AND SPRING TERMS

	On-Campus	Off-Campus	Commuter
Total California Resident Budget	\$34,356	\$30,183	\$25,671
Non-Resident Tuition	\$22,878	\$22,878	\$22,878
Total Non-California Resident Budget	\$57,234	\$53,061	\$48,549

### Financial Aid

#### Award Summary

**2015**

Financial Aid Summary Link: View your estimated cost of attendance and expected family contribution.

#### Aid Year

Award Description	Category	Offered	Accepted
UC Santa Cruz Grant	Grant	20,071.00	0.00
Non-Resident Exemption	Waiver	22,878.00	0.00
<b>Aid Year Totals</b>		<b>42,949.00</b>	<b>0.00</b>

#### Terms

##### 2014 Fall Quarter

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
UC Santa Cruz Grant	Grant	6,690.00	0.00
Non-Resident Exemption	Waiver	7,626.00	0.00
<b>Term Totals</b>		<b>14,316.00</b>	<b>0.00</b>

##### 2015 Winter Quarter

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
UC Santa Cruz Grant	Grant	6,690.00	0.00
Non-Resident Exemption	Waiver	7,626.00	0.00
<b>Term Totals</b>		<b>14,316.00</b>	<b>0.00</b>

##### 2015 Spring Quarter

[View Scheduled Disbursement Dates](#)

Award Description	Category	Offered	Accepted
UC Santa Cruz Grant	Grant	6,691.00	0.00
Non-Resident Exemption	Waiver	7,626.00	0.00
<b>Term Totals</b>		<b>14,317.00</b>	<b>0.00</b>

## 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

#### 2014-2015 Federal Aid Year

##### Aid Year

Award Description	Category	Offered	Accepted
Federal Pell Grant	Grant	5,730.00	5,730.00
Federal SEOG Grant	Grant	1,000.00	1,000.00
Cal Grant B Subsistence	Grant	1,648.00	1,648.00
State EOP	Grant	1,500.00	1,500.00
State University Grant Fall	Grant	2,736.00	2,736.00
State University Grant Spring	Grant	2,736.00	2,736.00
Federal Work-Study	Work/Study	3,500.00	3,500.00
Direct Subsidized Loan 1	Loan	3,358.00	3,358.00
<b>Aid Year Totals</b>		<b>22,208.00</b>	<b>22,208.00</b>

##### Terms

#### Spring 2015

Award Description	Category	Offered	Accepted
Federal Pell Grant	Grant	2,865.00	2,865.00
Federal SEOG Grant	Grant	500.00	500.00
Cal Grant B Subsistence	Grant	824.00	824.00
State EOP	Grant	750.00	750.00
State University Grant Spring	Grant	2,736.00	2,736.00
Federal Work-Study	Work/Study	1,750.00	1,750.00
Direct Subsidized Loan 1	Loan	1,679.00	1,679.00
<b>Term Totals</b>		<b>11,104.00</b>	<b>11,104.00</b>

#### Fall 2014

Award Description	Category	Offered	Accepted
Federal Pell Grant	Grant	2,865.00	2,865.00
Federal SEOG Grant	Grant	500.00	500.00
Cal Grant B Subsistence	Grant	824.00	824.00
State EOP	Grant	750.00	750.00
State University Grant Fall	Grant	2,736.00	2,736.00
Federal Work-Study	Work/Study	1,750.00	1,750.00
Direct Subsidized Loan 1	Loan	1,679.00	1,679.00
<b>Term Totals</b>		<b>11,104.00</b>	<b>11,104.00</b>

## SAMPLE FINANCIAL AID AWARD LETTER: CITY COLLEGE OF SAN FRANCISCO

### **Need Calculation**

Cost of Attendance	\$11,901.00
Estimated Family Contribution	\$ .00
Initial Need	\$11,901.00
Outside Resource	\$1,256.00
Need	\$10,645.00

### **Cost of Attendance**

Books & Supplies	\$1,746.00
Enrollment and/or Health Fees	\$1,290.00
Miscellaneous Personal Expense	\$3,132.00
Room & Board	\$4,599.00
Transportation	\$1,134.00
<b>Total:</b>	\$11,901.00

### **Housing**

**Status**  
Off Campus

### **Expected Enrollment**

**Status**  
Full-Time

### **Financial Aid Award by Term for the Aid Year Jul 2014-Jun 2015**

	Fall 2014 Credit		Fall 2014 Non-Credit		Spring 2015 Credit		Spring 2015 Noncredit		Total
	Status	Amount	Status	Amount	Status	Amount	Status	Amount	
<b>Fund</b>									
Federal Pell Grant	System Accepted	\$2,865.00			System Accepted	\$2,865.00			\$5,730.00
Federal SEOG	System Accepted	\$60.00	System Accepted	\$ .00	System Accepted	\$60.00	System Accepted	\$ .00	\$120.00
<b>Totals</b>		\$2,925.00		\$ .00		\$2,925.00		\$ .00	\$5,850.00



## 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

### Materials and Handouts

Comparing Your Financial Aid Award Letters

### Approximate Time Needed:

1-2 class periods

### 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.

## 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

## 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?

### Comparing Your Financial Aid Award Letters

College Name				
<b>Cost of Attendance (COA)</b>	\$	\$	\$	\$
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)	\$	\$	\$	\$
<b>Financial Aid Award Letter Total (Sum A – E)*</b>	\$	\$	\$	\$
<b>Financial Gap/Unmet Need Total (Subtract Financial Aid Award Letter Total from COA)</b>	\$	\$	\$	\$

\* 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

# California College Applications Overview

## 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.

## 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.

<ul style="list-style-type: none"><li>● SF State*</li><li>● CSU East Bay</li><li>● CSU Bakersfield</li><li>● CSU Channel Island</li></ul>	<ul style="list-style-type: none"><li>● CSU Dominguez Hills</li><li>● CSU Maritime Academy</li><li>● CSU Stanislaus</li></ul>
---	---

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](https://secure.csumentor.edu/planning/high_school/cal_residents.asp)

Impacted CSU Campuses & Majors: <https://www.calstate.edu/sas/documents/impactedprogramsmatrix.pdf>

# CSU Eligibility Index Calculator

SAT Scores:	ACT Scores:
$(\text{Your GPA}) \times 800 + \text{Your SAT Total}$	$(\text{Your GPA}) \times 200 + (10 \times \text{ACT Comp})$
>>> My index is ____	>>> My index is ____

Once you have your SAT or ACT scores, we can calculate your eligibility for impacted CSU campuses and majors.

# 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

# Admissions Data on collegeboard.org

[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.

Early Decision	Early Action
<ul style="list-style-type: none"><li>• Apply early (usually Nov.)</li><li>• Get an early response</li><li>• <b>Binding:</b> if accepted, you must attend that college. You cannot change your mind.</li><li>• Apply to only 1 college ED; apply to all other colleges regular decision if not accepted</li></ul>	<ul style="list-style-type: none"><li>• Apply early (usually Nov. or Dec.)</li><li>• Get an early response</li><li>• <b>Non-Binding:</b> If accepted, make your decision by May 1</li></ul>



# **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

## Instructions

Use the two spreadsheets to keep track of your login information and test scores.

School/System	Login	Password	Link/URL	Description
College GreenLight			<a href="http://www.CollegeGreenlight.com">http://www.CollegeGreenlight.com</a>	College & scholarship search engine
College Board			<a href="http://student.collegeboard.org/">http://student.collegeboard.org/</a>	Search for and explore colleges
California State University			<a href="https://secure.csumentor.edu/">https://secure.csumentor.edu/</a>	Application for the 23 CSU campuses
University of California			<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>	Application for the 9 UC campuses
Common Application			<a href="https://www.commonapp.org/Login">https://www.commonapp.org/Login</a>	1 Application for over 500 private College and Universities
Common Black College Application			<a href="http://www.eduinonline.com/">http://www.eduinonline.com/</a>	1 Application for 31 HBCU's
California Colleges			<a href="https://secure.californiacolleges.edu/">https://secure.californiacolleges.edu/</a>	Resources on colleges in CA

Exam Date	Critical Reading Score	Math Score	Writing Score	Total	Essay Score
				0	
				0	
				0	
				0	
				0	
				0	

# 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.

## 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.



## Likely, Target, Reach Definitions

Term	Description
<b>Likely</b>	Your grades and test scores are higher than the average grades and test scores of students admitted at the college.
<b>Target</b>	Your grades and test scores are about the same as the average admitted at the college.
<b>Reach</b>	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.
<b>Lottery</b>	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.
<b>Financial Safety</b>	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.

“My Final College List” excel file should include the following column headers:

Rank (your 1st choice, 2nd choice, etc. or doesn't matter)	College Name	Location	Size	Major	Cost	Acceptance rate	4-year and 6-year graduation rates	Likely, Target, Reach, Lottery, Financial Safety?
--	--------------	----------	------	-------	------	-----------------	------------------------------------	---

Brief explanation of why it is a Likely, Target, Reach, Lottery, Financial Safety	What do you like about this college? Describe as much as possible.	What, if any, reservations do you have about this college?	Application Deadline	Application Fee
---	--	--	----------------------	-----------------

Essay Required?	Number of Letters of Rec?	Supplemental documents required?	CSS Profile required?	Institutional scholarships you're eligible for
-----------------	---------------------------	----------------------------------	-----------------------	--

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.

## Instructions


Follow this presentation to assist you as you complete the CSU application.


# **CSU Undergraduate Applications**

Class of 2015

[Home](#)[What is CSU Mentor?](#)[Explore Campuses](#)[Plan for College](#)[Apply Online](#)[Financial Aid](#)[Ask an Expert](#)

CSU Mission • **List of Campuses** • CSUMentor Features

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 Print this page

# List of Campuses by Region

1

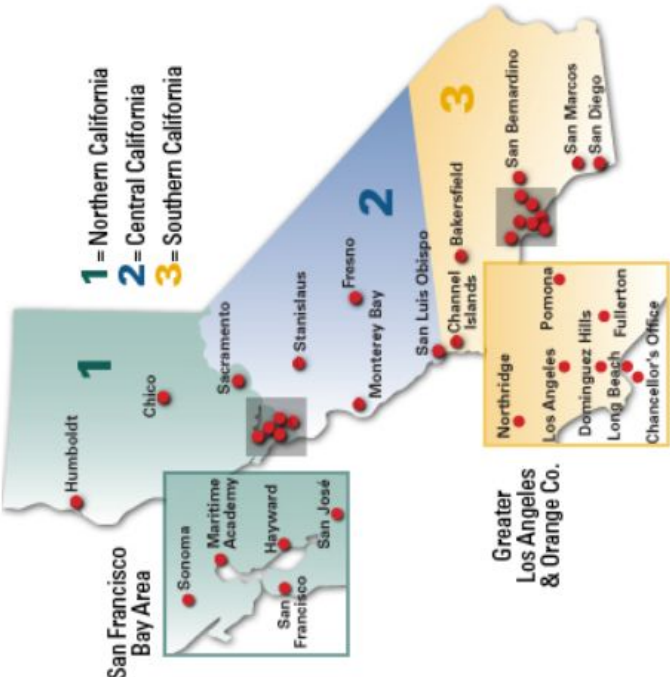
1 = Northern California

2

2 = Central California

3

3 = Southern California



**San Francisco Bay Area**

- Humboldt
- Chico
- Sonoma
- Maritime Academy
- San Francisco
- Hayward
- San Jose

**Central California**

- Sacramento
- Stanislaus
- Fresno
- Monterey Bay
- San Luis Obispo
- Channel Islands
- Bakersfield

**Southern California**

- Northridge
- Los Angeles
- Pomona
- Dominguez Hills
- Long Beach
- Fullerton
- Chancellor's Office
- San Bernardino
- San Marcos
- San Diego

**Greater Los Angeles & Orange Co.**





If you have technical problems, please call (800) 468-6927 or e-mail us at [support@CSUMentor.edu](mailto:support@CSUMentor.edu).

Term	Application submission period beginning
Fall	October 1
Winter	June 1
Spring	August 1
Summer	February 1

### Which campuses are still accepting applications?

**Step 3: Be sure to click on Fall 2016.**

Click this box if you  
are applying for:

**FALL 2014**  
**SUMMER 2014**  
**WINTER 2015**  
**SPRING 2015**

# Applying to Campuses

The California State University

SEARCH:

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HOME

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COLLEGE PLANNING

FINANCIAL AID

TESTING

HELP

[UNDERGRAD APP](#) | [GRADUATE APP](#) | [INTERNATIONAL APP](#) | [FILING STATUS REPORT](#) | [FAFSA ON THE WEB](#) | [CALSTATETEACH](#) | [EOP APP](#)

[E-MAIL THIS](#) | [PRINT THIS](#) | [CONTACT INFO](#) | [HELP TUTORIAL](#) | [FRESHMAN INSTRUCTIONS](#) | [TRANSFER INSTRUCTIONS](#)

UNDERGRADUATE ONLINE APPLICATION

Esta función no está disponible en español.

If you want to refer to written instructions, click here.

If you have technical problems, please call (800) 468-6927 or e-mail us at [support@CSUMentor.edu](mailto:support@CSUMentor.edu)

Term	Application submission period beginning
Fall	October 1
Winter	June 1
Spring	August 1
Summer	February 1

## UNDERGRADUATE APPLICATION 2014 - 2015

PERSONAL APPLICATION MANAGER  
FOR DANIELLE JOHNSON

These are the CSU campuses to which you may apply:

Select a campus from the list and click [ start new application ]

Cal Maritime

Cal Poly Pomona

Cal Poly San Luis Obispo

CSU Bakersfield

CSU Channel Islands

[ start new application ]

Choose a CSU campus and then click “start new application”

Online applications you have started but not submitted:

Campus name	Current page	Date started	Date last modified	Action
San Francisco State University	3	10/1/2013 9:53:00 AM	10/18/2013 10:31:00 AM	RESUME REMOVE

Online applications already submitted:

Note: You CANNOT modify or resubmit applications you have already submitted. Submitting an application on the internet is similar to mailing in your application: once it is submitted, the university has it and online modifications are not possible. Changes might only be made by contacting the university's **admissions office**.

If you would like to print out a copy of all the information submitted in your application (for your records only), click the "View" link below for the CSU campus you wish to print and click the corresponding link in the application agreement statement.

Campus name	Term/Year	Date submitted	Action
You have not submitted any online applications.			



## 2014-2015 UNDERGRADUATE APPLICATION FOR ADMISSION

### Application Information

A message from the campus:

#### Fall 2014:

##### First-Time Freshmen Applicants:

CSU Fullerton will open for First-Time Freshmen applicants for Fall 2014 beginning October 1, 2013 through November 30, 2013. Apply early!

CSU Fullerton is an impacted campus for all first time freshmen. Impaction means that there are more applications for a campus than can be accommodated. In order to ensure that capacity is not exceeded, more rigorous standards are applied to the freshmen applicant pool.

**Nursing Applicants:** Admission to the Nursing major at CSU Fullerton for First-Time Freshmen is very competitive as CSUF continues to have more qualified applicants than available space in the program. To be considered for admission to Nursing, First-Time Freshmen applicants must demonstrate the following:

- Minimum Eligibility Index: 4200 (SAT) or 1010 (ACT)
- Chemistry: Grade of "B" or higher (if AP then "C" or higher) by end of your Junior year (11<sup>th</sup> grade)
- Biology: Grade of "B" or higher (if AP then "C" or higher) by end of your Junior year (11<sup>th</sup> grade)

**Computer Engineering Integrated BS/MS Applicants:** Admission to the integrated BS/MS in Computer Engineering is expected to be very competitive with limited space available. To be considered for admission, First-Time Freshmen applicants must demonstrate the following:

- Successful completion of at least three (3) AP tests (scores of 3, 4, or 5) for a total of 10 semester units
- One of the AP tests must be Mathematics/Calculus AB or Mathematics/Calculus

### Contact Us

California State University, Fullerton  
P.O. Box 6808  
Fullerton, CA 92834-6808  
Website: [www.fullerton.edu](http://www.fullerton.edu)  
Email: [admissions@fullerton.edu](mailto:admissions@fullerton.edu)

### Instructions

To complete this online application, type your answers in the corresponding fields or select your answers from the popup lists (where applicable).

After you complete a screen, click the NEXT button at the bottom or on one of the sections listed on the left column to move to a different screen. Before you are allowed to jump screens, we will inspect your data on the current screen for errors or inconsistencies. If errors or omissions are found, you will be returned to the screen to correct your answer(s). Otherwise, your data will be saved and you will proceed to the requested screen. We also allow you to skip to another screen without your new data being saved. Be aware that if you use the Skip & Jump function on the left column, data on the current screen will not be saved and will have to be reentered prior to submittal.

Once you have completed the application, click the SUBMIT button located on the left column to submit the application.

Click here if you have any technical questions or need assistance with this online 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.**

#### What happens next?

You will receive an application acknowledgement from the campus to which you applied. Read it carefully and follow any instructions about when to send in documents or when to take placement tests.

You will receive notification of your admission status.

When you are admitted to the campus, you will receive information about orientation, registration, and other activities for new students.

**Important note:** E-mail is a primary means of communication with applicants. CSU campuses will send important messages to you using the e-mail address that you list on this application. It is your responsibility to check this e-mail account regularly and read your messages from the CSU. Be sure to notify the campus(es) if this e-mail address changes.

#### Admissions Information

*Click on the following to see additional information:*

- [First-time Freshman Admission Requirements](#)
- [Transfer Admission Requirements](#)
- [International Student Admission Requirements](#)
- [Financial Aid Information](#)
- [Costs of Attendance](#)
- [Educational Opportunity Program](#)
- [Other Programs and Services](#)
- [Housing Information](#)
- [Immunization Requirements](#)
- [Test of English as a Foreign Language \(TOEFL\)](#)
- [Impacted Programs – Major vs. Minor](#)
- [Campus Impactation](#)
- [Residency Information](#)
- [Initial Filing Periods](#)
- [CSU Transfer Road Maps](#)
- [Services to Students with Disabilities](#)

#### Browser Popup Window Notice

Please be aware that this online application makes use of popups to display information, instructions, or for answering questions on certain screens. If your browser is set to block popups, or you are using a third-party popup blocking tool, please configure your system to allow popups on CSUMentor. For more information regarding making these browser changes, please consult your software's documentation or help for instructions.

[Begin Application for CSU Channel Islands](#)

[<<< GO BACK TO THE APPLICATION MANAGER](#)

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.



This is a preview project operating on a beta server. It is intended for customer testing only. Please do not enter real information since it is not secure and any information entered here will not carry over to the live release of this product. Prospective students please go to [www.csunetor.edu](http://www.csunetor.edu).

1

Enrollment Information

2

Name and Address

3

Personal Information

4

California State Residency Information

5

Demographic Information

6

High School Information

7

College Information

8

High School Preparation 1

9

High School Preparation 2

10

College Courses

11

Educational Opportunity Program (EOP)

12

Application Fee Waiver

13

Review Your Application

Ship to Another Screen

Save This Screen

Submit Your Application

Help Video

Instructions for this Screen

2014-2015 Undergraduate Application for Admission

1. ENROLLMENT INFORMATION

Application Information

Term applying for: Select a term

Main campus/Off-campus center: Select a campus

Intended major: Select an intended major

What is your degree objective? Select a degree

Credential Program

Campus Housing

Entry Status

Previous Application/Attendance (if applicable)

Campus Authorization Information

# Screen 1: Enrollment Information

- Application Information
  - Term Apply for
  - Main campus/Off-campus  
(Depending upon the campus, this question may or may not appear on the application.)
  - Intended Major
  - Degree Objective
  - Credential Objective
  - Campus Housing  
(Depending upon the campus, this question may or may not appear on the application.)
- Entry Status
  - Graduating HS Senior with or without college credit

This is a preview project operating on a beta server. It is intended for customer testing only. Please do not enter real information since it is not secure and any information entered here will not carry over to the live release of this product. Prospective students please go to [www.csumentor.edu](http://www.csumentor.edu).



1 Enrollment Information

2 Name and Address

3 Personal Information

4 California State Residency Information

5 Demographic Information

6 High School Information

7 College Information

8 High School Preparation 1

9 High School Preparation 2

10 College Courses

11 Educational Opportunity Program (EOP)

12 Application Fee Waiver

13 Review Your Application

Skip to Another Screen

Save This Screen

Submit Your Application

Help Video

Instructions for this Screen

back to top

1. ENROLLMENT INFORMATION

Application Information

Term applying for: Fall 2014

If the term you are applying for isn't listed above, this campus may have [closed the term](#) or you have already submitted to the term. You may view the [Application History Status Report](#) for out of which CSU campuses are currently accepting applications, which majors are open or closed, and the [Application History](#) for the campus you are applying to.

If you are looking for Spring 2014, you are in the wrong application. Return to [Admission Applications](#) and select the 2013-2014 application.

Click the "Select a campus and major" button to find/change your campus and major:

Campus selected: Long Beach campus

Intended major selected: Business: Marketing BS

Majors designated with @CalStateOnline are fully-online degree programs offered through [Cal State Online](#). Before selecting these programs, applicants should speak with a Cal State Online Coach by calling (800) 247-6168.

Emphasis/Concentration (if any):

Alternate major selected: Click the "Select a campus and major" button to choose a major

What is your degree objective? BS

Teacher or other credential program: Not interested in a credential program

Credential Program

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

Previous Application/Attendance (if applicable)

When did you last apply to CSU Long Beach?

Term last applied: Never applied Year: YYYY

Miscellaneous Information

How did you hear about CSU and CSUMentor? Friend

Campus Authorization Information

If you have received an authorization number from the CSU Long Beach admissions office, enter it below. Please note that if you enter a number below, it will be locked to this application once this screen has been saved.

**YOU DO NOT NEED AN AUTHORIZATION NUMBER TO APPLY.** If you have NOT received an authorization number from the admissions office, please leave the box empty.

Authorization number:

save and continue >>>

# Entry Status Options for Applicants

<b>Entry Status</b> 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.)	<div>back to top</div>
<div>Graduating high school senior with no college credit</div> <div>Select your entry status</div> <div>Graduating high school senior with no college credit</div> <div>Graduating high school senior with college credit</div> <div>Transfer student with fewer than 30 semester/45 unit quarter units</div> <div>30-59.5 semester units/45-89.5 quarter units</div> <div>New 60-89.5 semester units/90-134.5 quarter units</div> <div>90 or more semester units/135 or more quarter units</div> <div>Have bachelor's degree or equivalent</div>	<div>back to top</div>
<b>Previous Application/A</b> When did you last apply to CSU? Term last applied: New	



- 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!**

[back to top](#)

### Applicant Information

Social Security number:  ###-##-####

Reenter your Social Security number (for verification):  ###-##-####

You are required to include your Social Security number on admission application forms to all CSU campuses pursuant to Section 41221, Title 5, Code of California Regulations and Section 6109 of the Internal Revenue Code. CSU campuses may use the Social Security number to identify your student record maintained in your association with the campus and, if needed, to help collect debts owed the university. Social Security numbers are also used by the Internal Revenue Service to identify you as a taxpayer and to help determine whether you, or a person claiming you as a dependent, may take a credit or deduction to reduce federal income taxes. If you do not have a Social Security number at the time you file the application, you may leave the item blank and the campus will assign a temporary number. However, you should obtain a Social Security number, unless you are prioritized by law from doing so, and submit it to the campus as soon as you are able to do so. Failure to furnish your correct Social Security number may result in the imposition of a penalty by the Internal Revenue Service.

California Statewide Student Identifier or SSID:  (Optional. For California residents only, if known.)

Providing the ten digit Statewide Student Identifier or SSID is optional. The SSID allows individual student data to be uniquely distinguishable from that of other students. California public school students that attended a California public school anytime since 2006 were assigned a SSID. The SSID may be indicated on your high school transcripts or other school documentation. If you don't know your SSID and would like to include it in this application, contact your high school, school or district office.

Date of birth:  01/23/1994 mm/dd/yyyy

Sex:  Female

Are you a foster youth, orphan, or ward of the court or were you ☐ Foster youth prior to age 18? ☐ Orphan (check all that apply) ☐ Ward of the court

Place of Birth

City:  bellflower

U.S. state/territory:  California

Country:  United States of America

Citizenship

Country of citizenship:  United States of America

Permanent Residence

If you live in California:

California county:  Los Angeles

If you live outside of California:

U.S. state/territory:  Select a U.S. state/territory

– OR –

Country:  Select a country

[back to top](#)

# 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.

[back to top](#)

**Applicant's California Residency**

Your responses to these questions are required for the campus to make a preliminary assessment of your California residency status for admission and tuition purposes. The campus may request additional information prior to making a final residence determination. (Education Code Section 68041)

Answer the following questions as they pertain to you.

What U.S. state/territory do you regard as your permanent home?

Do you claim California residency?

Have you lived in California continuously since birth?

If no, when did your present stay in California begin?  mm/dd/yyyy

[back to top](#)

**Previous Residences Outside the State of California**

If you currently live in California, list places you have lived before your present stay in California began (if applicable) and the parent with whom you resided.

U.S. state/territory:

Country:

Date from:  to:  mm/yyyy

Parent:

---

U.S. state/territory:

Country:

Date from:  to:  mm/yyyy

Parent:

# 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

Current or Last High School Attended		back to top
School name / Location	Term type	Dates of attendance
DE LA SALLE HIGH SCHOOL (CEEB: 050662)	Semester	6/2009 to 6/2012
<a href="#">EDIT</a>		<a href="#">DELETE</a>

back to top	
High school graduation date (or expected graduation date): 06/2012 mm/yyyy – OR –	
If you have or will receive a GED certificate, please indicate the date: mm/yyyy	
– OR –	
<input type="checkbox"/> Check here if you will not have graduated from high school or will not have received a GED	

Other High School(s) Attended		back to top
School name / Location	Term type	Dates of attendance
NO OTHER HIGH SCHOOL(S) ENTERED		
ADD A HIGH SCHOOL		

# Screen 6 – High School Information (cont.)

LIST OF HIGH SCHOOLS

First select the U.S. state/territory and/or country where your school is located.

U.S. state/territory: California

Country: United States of America

Select state

Select country

A	B	C	D	E	F	G	H	I	J	K	L	M
N	O	P	Q	R	S	T	U	V	W	X	Y	Z

Search:

Make sure that you have the correct U.S. state and/or country selected above.

Search for a school

Enter homeschool information

To search for a high school by name, city, or CEEB code\*, type all or part of the name in the field on the right and hit the 'Search for a school' button.

\*The CEEB code is a unique code assigned by the [College Board](#) to identify U.S. high schools and colleges.

Locate your school from the list on the right. School names are broken down alphabetically (unless you entered a search term in the box above), so use the letter buttons to move between sections.

A B MILLER HIGH SCHOOL (FONTANA, CA / CEEB: 050944)  
A PHILLIP RANDOLPH LEAD ACAD (SAN DIEGO, CA / CEEB: 054052)  
A+ EDUCATIONAL CENTER (MALIBU, CA / CEEB: 051936)  
ABC ADULT SCHOOL (CERRITOS, CA / CEEB: 051344)  
ABC CHRISTIAN SCHOOL THE (ARCADIA, CA / CEEB: 050131)  
ABC SECONDARY SCHOOL (CERRITOS, CA / CEEB: 050522)  
ABILITY PLUS SCHOOL INC. (TUSTIN, CA / CEEB: 053567)  
ABRAHAM LINCOLN HIGH SCHOOL (SAN JOSE, CA / CEEB: 053075)  
ABRAHAM LINCOLN HIGH SCHOOL (LOS ANGELES, CA / CEEB: 051520)  
ABRAHAM LINCOLN HIGH SCHOOL (RIVERSIDE, CA / CEEB: 052667)

[ next ]

[ cancel ]

You can search by a CEEB code.

449

# Screen 6 – High School Information (cont.)

Enter date test was  
taken or will be  
taken

Test Information

back to top

Enter test score(s) and date(s) taken or will be taken. Please note: CSU campuses will not use the SAT or ACT writing 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).

SAT

Date taken/ scheduled	Critical reading	Math	Writing
01/01/2011	500	600	700
mm/dd/yyyy			

ACT

Date taken/ scheduled	English	Math	Reading	Science	Writing	Composite
01/01/2011	30	30	30	30	30	30
mm/dd/yyyy						

TOEFL / IELTS / PTE Academic

back to top

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.

TOEFL (paper version)

Date taken/ scheduled	Total score
mm/dd/yyyy	

TOEFL iBT (internet version)

Date taken/ scheduled	Total score
mm/dd/yyyy	

IELTS (International English Language Testing System)

Date taken/scheduled: mm/dd/yyyy

Band score:

PTE (Pearson Test of English) Academic

Date taken/scheduled: mm/dd/yyyy

Overall score:

450

# Screen 8 – High School Preparation 1

AREA A :: Social Science/U.S. History/Government – 2 years (4 semesters)									
(One year of U.S. history or U.S. history and American government, and one year of a social science such as World History.)									
Grade level	Year	Title / School	Term type	Fall	Spring	Sum 1	Sum 2	Grades earned	Honors/AP/IB College
9	2009-10	U.S. History (AP) DE LA SALLE HIGH SCHOOL, CEEB 050602	Semester	A	A+	—	—	—	—
11	2011-12	AP Government and Politics United States DE LA SALLE HIGH SCHOOL, CEEB 050601	Semester	C+	B	—	—	—	—
12	2011-12	AP United States History SANTA MONICA HIGH SCHOOL, CEEB 050603	Semester	A	B	—	—	—	—
Total social science/U.S. history/government semesters: 6									
ADD A NEW SOCIAL SCIENCE/U.S. HISTORY/GOVERNMENT COURSE									
AREA B :: English – 4 years (8 semesters)									
Composition and literature designated as college preparatory.									
Grade level	Year	Title / School	Term type	Fall	Spring	Sum 1	Sum 2	Grades earned	Honors/AP/IB College
9	2009-10	British Literature P DE LA SALLE HIGH SCHOOL, CEEB 050602	Semester	B+	A	—	—	—	—
10	2010-11	AP English Language and Composition DE LA SALLE HIGH SCHOOL, CEEB 050602	Semester	B	A	—	—	—	—
11	2011-12	AP English Literature and Composition DE LA SALLE HIGH SCHOOL, CEEB 050601	Semester	B	B+	—	—	—	—
Total English semesters: 6									
ADD A NEW ENGLISH COURSE									
AREA C :: Mathematics – 3 years (6 semesters)									
Algebra I, geometry, algebra II, integrated math, and advanced mathematics. Courses taken in 7th and 8th grades may be considered (but 7th grade math courses as 8th grade).									
Grade level	Year	Title / School	Term type	Fall	Spring	Sum 1	Sum 2	Grades earned	Honors/AP/IB College
9	2009-10	Algebra 1 (IB) DE LA SALLE HIGH SCHOOL, CEEB 050602	Semester	A	A	—	—	—	—
10	2010-11	Geometry (IB) DE LA SALLE HIGH SCHOOL, CEEB 050602	Semester	C	B	—	—	—	—
11	2011-12	H-TriGeometry/Math Analysis AB WESTCHESTER HIGH SCHOOL, CEEB 051101	Semester	A+	—	—	—	—	—
11	2011-12	Pre-Calculus P DE LA SALLE HIGH SCHOOL, CEEB 050602	Semester	C+	C	—	—	—	—
Total mathematics semesters: 7									
ADD A NEW MATHEMATICS COURSE									

Click “Edit” to modify course

Click “Delete” to delete a course

Click “Add...Course” to enter a course



# Screen 8 – High School Preparation 1

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.

SOCIAL SCIENCE/U.S. HISTORY/GOVERNMENT COURSE SELECTION

HIGH SCHOOL COURSE ENTRY

Click the checkbox next to the name of each course you have taken or are currently attending for each high school you have attended. You can add eight more courses to this area.

If you have taken a course during an academic year that is not listed, please make sure that the attendance dates you listed for that school are entered correctly on screen 6. [If you continue to have problems viewing a particular academic year, you may click here to expand the courses shown.](#)

If the course you took is not listed, you may also manually type in the course name in the box provided. Please make sure to enter the course under the high school it was taken at and in the correct academic year.

HIGH SCHOOLS

EVEREST PUBLIC HIGH SCHOOL (CEEB: 054429), August 2010 to June 2014

2010-2011

☐ AP Government and Politics United States

☐ AP United States History

☐ World Studies I

☐ World Studies II

Other course 1:

Other course 2:

2011-2012

☐ AP Government and Politics United States

☐ AP United States History

☐ World Studies I

☐ World Studies II

Other course 1:

Other course 2:

2012-2013

☐ AP Government and Politics United States

☐ AP United States History

☐ World Studies I

☐ World Studies II

Other course 1:

Rectangular Logo



# Screen 11 – Educational Opportunity Program (EOP)

## 11. EDUCATIONAL OPPORTUNITY PROGRAM (EOP)

Are you interested in applying to EOP?

(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.

[back to top](#)

# Screen 12 – Application

## Fee Waiver

### 12. APPLICATION FEE WAIVER

You will only be able to submit this request for an application fee waiver **ONCE** on CSUMentor. **BE CERTAIN** that all of your information below is correct **BEFORE** you click on the button. You will **NOT** be able to change this information on CSUMentor after you click on the button at the bottom of the page.

back to top

Do you want to apply for a fee waiver? **Yes** back to top

Are you currently an active duty member or a veteran of the U.S. armed forces? **Yes**  
Are you a foster youth, orphan, or ward of the court or were you prior to age 18? **No**  
You may go back to the Personal Information screen to make corrections to the your answers to the previous two questions. back to top

Do you have legal dependents other than a spouse? **Select Yes or No** Select Yes or No back to top

Are you married or registered with the California Secretary of State as a domestic partner? Select Yes or No back to top

You are considered a **dependent** student if you were born in or after 1991 **UNLESS** you are:

- A graduate student
- Married or registered with the California Secretary of State as a domestic partner
- Have dependents other than a spouse
- A foster youth, orphan, or ward of the court
- A veteran or active duty member of the U.S. armed services

If you are a **dependent** student, the financial information you provided on the Personal Information Screen for your parent(s) total income and household size (including a spouse or domestic partner) is displayed below and will be used to determine your fee waiver eligibility.

If you are an **independent** student, the financial information you provided on the Personal Information Screen for your income and household size (including a spouse or domestic partner) is displayed below and will be used to determine your fee waiver eligibility.

**NOTE:** You may go back to the Personal Information screen to make corrections to your income and family size information before applying for a fee waiver. Please make sure that the information provided is complete and accurate.

**Dependent Students Only**

Estimated total family income for 2013: **\$70,000**

Total size of parents' household in 2013: **2**

— OR —

**Independent Students Only**

Applicant's (and spouse/partner's) total income for 2013: **—**

Total size of your household in 2013: **—**

Number of dependent children living with you in 2013: **—**

**IMPORTANT**

You will only be able to submit this request for an application fee waiver: **ONCE**. Please be certain that all of your information displayed above is correct **BEFORE** you click on the button below.

After you click the button, you will be notified as to whether you do or do not qualify for an application fee waiver. If you do not qualify for the fee waiver, you must pay the \$55 application fee.

**Be sure that your information above is correct before you click this button!!**

I have verified the information above and want to apply for an 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

454

# Screen 12 – Application Fee Waiver (Granted)

## 12. APPLICATION FEE WAIVER

[back to top](#)

### 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

**Review  
with  
your  
advisor  
or  
teacher!**

## 13. REVIEW YOUR APPLICATION

back to top

Please review all of the information below. If you notice any errors or omissions, you may go back to any of your previous screens to make corrections. Once you are satisfied that you have completed this application as completely and accurately as possible, click the "Submit Your Application" button to the left or the "Submit Your Completed Application" button at the bottom of this screen.

ENROLLMENT INFORMATION
Term applying for: <b>Fall 2014</b>
Main campus/Off-campus center: <b>Long Beach Campus</b>
Intended major: <b>Business: Marketing BS</b>
Emphasis/Concentration: <b>—</b>
Alternate major: <b>—</b>
What is your degree objective? <b>BS</b>
Teacher or other credential program: <b>Not interested in a credential program</b>
Entry status/Total college transferable units: <b>Graduating high school senior with no college credit</b>
When did you last apply to CSU Long Beach? <b>Never applied</b>

NAME AND ADDRESS
Legal name: <b>Test, Sharon</b>
Current mailing address: <b>100 Corporate Pointe, Culver City, CA 90230</b>
Permanent address: <b>100 Corporate Pointe, Culver City, CA 90230</b>
Primary telephone: <b>(310) 555-5555</b>
Cell phone: <b>—</b>
E-mail address: <b>idontknow@yahoo.com</b>

PERSONAL INFORMATION
----------------------

## Screen 13 – Submit Your Application (bottom of page)

**SUBMIT YOUR COMPLETED APPLICATION**

[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)

<b>CSU LONG BEACH</b> <b>UNDERGRADUATE APPLICATION AGREEMENT STATEMENT</b>	
<b>Your application to CSU Long Beach was already submitted on 9/23/2013 8:06:00 PM for Fall 2014.</b>	
Please print this page now (use your browser's print function). Do not mail it to CSU Long Beach	
<a href="#">If you wish to print out a copy of the information you submitted in this application for your records only, click here.</a>	
<ol style="list-style-type: none"><li>1. Your application has been submitted to CSU Long Beach.</li><li>2. You have been tentatively approved for a fee waiver (final fee waiver determination must be made by the university).</li><li>3. You will be sent written notification and additional application information within 30 working days.</li></ol>	
<b><a href="#">Remember to complete the admission requirements as specified in the introduction.</a></b>	
<b>If you would like to apply to another CSU campus, please return to the Application Manager by clicking the link below.</b>	
<b>Thank you for your interest in the Educational Opportunity Program!</b> You may now complete the online EOP application for CSU Long Beach ( <a href="#">click here to be taken to the EOP Application Manager</a> ). You can also return to CSUMentor at a later time to fill out the EOP application (a link is available in the Apply Online section).	
<b>Recent high school graduates:</b> <a href="#">Learn more about preparing for the CSU math and English placement requirements.</a>	
Applicant name:	Sharon Test
Application:	CSU Long Beach
Social Security number:	XXX-XX-5179 (full number hidden for security purposes)
Application term:	Fall 2014
Major:	Business: Marketing BS
E-mail address:	idontknow@yahoo.com
Confirmation number:	0008-0F2014-2-09232013-00665266-00221740
Date submitted:	9/23/2013 8:06:00 PM
<b>NONDISCRIMINATION POLICY</b>	

## 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](mailto:support@csumentor.edu)



## Website

[www.csumentor.edu](http://www.csumentor.edu)

## Bilingual Support in Spanish

**Monday through Friday 6:30am – 6:30pm**

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.

## 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".

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:

<ul style="list-style-type: none"><li>○ Orientation</li><li>○ Tutoring</li><li>○ Advising</li></ul>	<ul style="list-style-type: none"><li>○ Grants / Financial Aid</li><li>○ Summer Bridge Program</li></ul>
---	--

# 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
  - A student who meets the minimum GPA requirement, but does not have a high enough ACT/SAT score for CSU

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?

# EOP Letters of Rec - 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!

# EOP Essays - CSU

To apply to EOP at CSUs, you need to write five SHORT essay responses.

Look over the questions right now. Your responses need to be AT LEAST a paragraph long each, and must be written in complete sentences!

# 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.



# Time to work

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.

## Instructions

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:  
<http://admission.universityofcalifornia.edu/counselors/files/apply-online-freshman-cal.pdf>

# Freshman Timeline

Date	Task
August 1	Application opens for fall admission
November 1 – 30	Submit your UC application
Early January	Update December test scores
March 1 – 31	Notification of admission decision
May 1	Statement of Intent to Register (SIR) deadline
July 1	Final transcript deadline

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](https://admissions.universityofcalifornia.edu) and create an account

The screenshot shows the UC Applications website interface. At the top, there is an orange banner with a gear icon and the text: "The application deadline is approaching. You have 3 more days to submit your application to meet the Nov-30 deadline." Below the banner, there are two main sections. The left section is titled "Sign In" and contains two input fields: "E-mail Address" and "Password". Below these fields is a blue "GO" button with a right-pointing arrow. To the right of the "GO" button is a link that says "Forgot your password?". The right section is titled "Create a New Account" and contains the text: "If you don't have an account you can create one here." Below this text is a blue "NEW ACCOUNT" button with a right-pointing arrow. An arrow points from the text "ALL first-time applicants start here" to the "NEW ACCOUNT" button.

ALL first-time  
applicants start here

# UC Applications

- Make sure you apply for **Fall Quarter/Semester 2015**, as a **Freshman**

UNIVERSITY  
OF  
CALIFORNIA

Danielle Johnson : my uc application | help | sign out

UNDERGRADUATE APPLICATION

Start Your Application STEP 1 OF 4

Term

Which term are you applying for?

☐ Fall Quarter/Semester 2014

☐ Winter Quarter/Spring Semester 2015

☒ Fall Quarter/Semester 2015

Level

Are you applying as a:

☒ Freshman

☐ Transfer

☐ Second Baccalaureate

☐ Limited Status

Select this if you already have a degree.  
Select this if you are not seeking a degree.

NEXT ▶

Questions?

What is the application deadline for this term?

How do I know if I'm a freshman or transfer applicant?

I'm still in high school, but I have enough college credits to be a sophomore at UC. Should I apply as a freshman or transfer?

I attend an Early or Middle College high school and I will have enough college credits to be a sophomore or junior at UC. Should I apply as a freshman or transfer?

I'm a community college transfer with more than 90 semester (135 quarter) units. Should I apply as a junior or senior?



# 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

## Inside This Section

- > 1. Campuses
- > 2. Majors
- > 3. Review Campuses & Majors

## Questions?

Which campuses are open to me?



# 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.

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# 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!

UNIVERSITY OF CALIFORNIA

START

CAMPUSES & MAJORS

SCHOLARSHIPS

ABOUT YOU

ACADEMIC HISTORY

ACTIVITIES & AWARDS

TEST SCORES

PERSONAL STATEMENT

SUBMIT

Danielle Johnson, fall quarter/semester 2015 : my uc application | help | sign out

UNDERGRADUATE APPLICATION

Start Your Application

STEP 2 OF 4

Your Address

What is your current mailing address?

Country

Select

Street Address

Apt/Suite/Unit/Bldg/Route # (optional)

City

Please confirm your mailing address

☐ This is my correct address. I understand it will be used for all mail correspondence.

Danielle Johnson

Select

STAMP

Inside This Section

> 1. Term & Level

> 2. Address & Phone

> 3. Residency

> 4. Citizenship

Questions?

What is the difference between a current and permanent address?

My current address is outside the U.S. Is that OK?

What is Plus 4?

I don't have a phone number. What should I enter in that field?

# The Basics

## Your Address

What is your current mailing address?

Country

Street Address

Apt/Suite/Unit/Bldg/Route # (optional)

State/U.S. Territory

City

Zip  Plus 4

Make sure to type your address correctly.  
Important mail often gets returned to the UC admissions office because students incorrectly typed their address.

Please confirm your mailing address

☒ This is my correct address. I understand it will be used for all mail correspondence.

Katniss Everdeen  
1600 Challenge Drive  
Concord, CA 94520

STAMP

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# More Basics

## Your Phone Number

### What is your phone number?

☒ United States ☐ International

Primary Phone

(925) 555-1234

Phone Type

Cell/Mobile

☒ I authorize text messages to the telephone number above and accept responsibility for any charges incurred.

☒ United States ☐ International

Alternate Phone

(925) 555-5678

Phone Type

Home/Other

We will use this number only if we are unable to reach you at your primary number.

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# 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?

Month

Feb

Year

2008

**You need to click  
yes in order to be  
eligible for the  
Dream Act.**

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# Citizenship

**Undocumented students can choose “No Selection”**

**Citizenship**

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/>





# 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

Click to expand  
the list of  
majors

Major Alt.  
Major

☒ ☐

B.A.  
B.S.

No Alternate Major

☒

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# 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 about UCSD colleges](#)

Learn more about the college system before deciding on your UCSD college preferences.

**You must click here  
before ranking the  
colleges**

### 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.

<input type="text"/>	Revelle College
<input type="text"/>	John Muir College
<input type="text"/>	Thurgood Marshall College
<input type="text"/>	Earl Warren College
<input type="text"/>	Eleanor Roosevelt College
<input type="text"/>	Sixth College

**Rank order does NOT  
affect chances of  
admission.**

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# 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!

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# 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)

\$  .00

Last Year (2012)

\$  .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.

# 7<sup>th</sup> and 8<sup>th</sup> Grade Courses

## Advanced Courses in Mathematics

Course Name	No. of Semesters
<input type="text" value="Algebra"/>	<input type="text" value="2"/>

## Courses in Language Other Than English

Course Name	No. of Semesters
<input type="text" value="Spanish 1"/>	<input type="text" value="2"/>
<input type="text"/>	<input type="text" value="Select"/>

### Inside This Section

- > Introduction
- > **1. 7<sup>th</sup>/8<sup>th</sup> Grade Courses**
- > 2. High Schools & Courses
- > 3. Colleges & Courses (in HS)
- > 4. Other Academic History
- > 5. Review Academic History



**Make sure to pay  
attention to what  
page you're on!**

# High Schools Attended

Click “Semester”  
under “... term  
system”

**Add Information about EVEREST PUBLIC HIGH SCHOOL**

What grades did you attend here?

☐ 9th Grade

☐ 10th Grade

☐ 11th Grade

☐ 12th Grade

During what dates did you attend this high school?

Start date: Month  Select  Year

End date: Month  Select  Year

Is this or will this be the high school you graduated from?

☐ Yes ☐ No

What is your school's grading system?

A B C D F

What is your school's term system?

☒ Full (1 final grade per year)

☒ Semester (2 final grades per year)

☐ Trimester (3 final grades per year)

☐ Quarter (4 final grades per year)

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# 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.

Course Name		Honors Type	Grade 1	Grade 2
<input type="checkbox"/> 9th Grade History/Social Science				
<input type="checkbox"/> 9th Grade English				
<input type="checkbox"/> 9th Grade Mathematics				
<input type="checkbox"/> 9th Grade Laboratory Science				
<input type="checkbox"/> 9th Grade Language Other Than English				
<input type="checkbox"/> 9th Grade Visual and Performing Arts				
<input type="checkbox"/> *Stage Design AB		NH		
<input type="checkbox"/> *Theatre Arts Workshop AB		NH		
<input type="checkbox"/> Advanced Band AB		NH		
<input checked="" type="checkbox"/> Choir AB		NH	B	A
<input type="checkbox"/> Design AB		NH		

# HS Courses & Grades

☐ I don't see all of my courses.

Add any courses you took that aren't in the list above.

Subject Area/Course Category	Course Name	Honors Type	Grade Term 1	Grade Term 2	Grade Term 3	Grade Term 4
Biological Sciences	Botany	NH	A	NO		
Select		--	--	--		

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

Delete

Dates	Grader/Term	Grading Sys	
06/2013-08/2013	<b>11th Grade</b> Summer 2013	A B C D F	Edit

ADD ANOTHER COLLEGE

- Biological Science
- Business
- Business Accounting
- Chemistry
- Chinese

Dept.	Course No.	Course Title	Units	Grade	Subject Area/Course Category
<input checked="" type="checkbox"/> CHIN	120	First Term Mandarin Chinese	5	B	Yr 2 Lang Other Than English
<input type="checkbox"/> CHIN	121	Second Term Mandarin Chinese			
<input type="checkbox"/> CHIN	220	Third Term Mandarin Chinese			

# 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: 155 Characters 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

## Coursework Other Than A-G

What was the course name?  
Elec Publishing/Graphic Design

During which high school year(s) did you take the course?  
☒ 9th ☒ 10th ☒ 11th ☒ 12th ☐ After 12th

How much time were you in class?  
Hours per Week Weeks per Year  
8 20

Briefly describe the course.  
(Entries over 160 characters will be truncated. The following characters count as Character Count: 126 Characters Remaining: 34)  
Learn production, distribution, and user interaction to computerbased production of text, graphic design and interactive media.

Choose up to 5 of your most meaningful experiences for each category.

- Non a-g Coursework
- Educational Preparation Programs
- Community Service
- Work Experience
- Awards & Honors
- Extra Curricular Activities

## Volunteer & Community Service

For what organization did you volunteer?  
CASA

During which high school years were you involved?  
☐ 9th ☐ 10th ☒ 11th ☒ 12th ☐ After 12th

How much time did you devote to the organization?  
Hours per Week Weeks per Year  
8 40

Briefly describe the organization and your responsibilities.  
(Entries over 160 characters will be truncated. The following characters count as Character Count: 75 Characters Remaining: 85)  
Working with and advocating for young children in foster care environments.

# 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.

Self-report your scores here and order official scores to be sent to at least one UC campus.

### ACT Assessment Plus Writing

When did you take this test?

Month Year  
May 2013

### Scores

Composite English Mathematics  
28 28 28

Reading Science Combined English/Writing Writing  
28 28 28 12

☐ I have not received my scores yet.

If you plan to take or retake this test, what is the test date?

Month Year  
Nov 2013

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# 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	<input type="checkbox"/> 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

## Review & Submit STEP 1 OF 7

### Application Summary

 [View Application](#)

Expand All | Collapse All

[My Account](#) [Edit](#)

[Start Your Application](#)

[Campuses & Majors](#)

[Scholarships](#)

[About You](#)

[Academic History](#)

[Activities & Awards](#)

[Test Scores](#)

[Personal Statement](#)

COMPLETED

COMPLETED

COMPLETED

COMPLETED

COMPLETED

COMPLETED

COMPLETED

COMPLETED

COMPLETED

COMPLETED

START SUBMISSION PROCESS ▶

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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.

### A-G Subject Requirements

A preliminary tally of your validated coursework shows you need the following additional yearlong courses to fulfill the "a-g" subject requirements.

History/Social Sciences: 2  
English: 0  
Mathematics: 0  
Laboratory Science: 0  
Language Other Than English: 0  
Visual and Performing Arts: 0  
College-Prep Electives: 0

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# 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 the 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 in to 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 in to 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.

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# 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.

Campus(es) Selected	Berkeley Davis Irvine San Diego Santa Cruz
Application Fee Total 5 campus(es) x \$ 70	\$350.00
Total Due	\$350.00

## 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?

[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.**

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# 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



**Click here  
and expect this.  
Check your  
email for a  
submission  
confirmation**

**Congratulations! You have submitted your application to the University of California.**

### Receipt

**University of California Fall Quarter/Semester 2014 Application**

Thank you, Katniss Everdeen

Your application for undergraduate admission and scholarships for Fall Quarter/Semester 2014 has been received. An e-mail confirmation will be sent to [hyoonwu@gmail.com](mailto:hyoonwu@gmail.com) shortly.

PLEASE PRINT THIS RECEIPT AND KEEP IT FOR YOUR RECORDS.

### Payment Information

Application ID: 1901056

Date: 09/05/2013

Payment Method: Mail

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# 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.**

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## Unit Culminating Task: UC Personal Statement

### Purpose

The purpose of this lesson is to support students in writing their UC Personal Statement.

### Suggested Grade Level:

11, 12

### 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>

### Approximate Time Needed:

Varies

### 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?



## 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



## 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.

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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?

## 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



## 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



## 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.

# THE PERSONAL STATEMENT

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# 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!



# Personal Statement



**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.



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# 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](http://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?



Connect with Admissions! [www.admissions.ucsb.edu](http://www.admissions.ucsb.edu)

## 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.*



admissions.berkeley.edu/personalstatement

**Berkeley**  
UNIVERSITY OF CALIFORNIA

Office of Undergraduate Admissions

START HERE ACADEMICS TUITION BE BERKELEY VISIT BLOG

**THE PERSONAL STATEMENT**

UILDERS OF BERKELEY

**SIGN UP**  
Receive regular news, tips, and alerts

**JOIN US**  
Find an event

**EXPLORE**  
Explore our fully interactive campus map

**SEARCH**  
Type and hit Enter

Apply Freshman Transfer Students

**Personal Statement Topics**

Please read the complete information about the personal statement provided in the application. These are the prompts you will be asked to answer:

*As a vital part of your application, the personal statement—consisting of responses to two prompts—is reviewed by both the Admissions and the Scholarship Offices.*

## 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)

Scoring Domain	Emerging	Developing	Proficient	Advanced
<b>Claim</b>	<ul style="list-style-type: none"> <li>Contains an unidentifiable claim or vague position</li> <li>Does not explain background and context of topic/issue</li> <li>Draws superficial connections or conclusions</li> </ul>	<ul style="list-style-type: none"> <li>Introduces a claim that takes a position</li> <li>Somewhat explains background and context of topic/issue</li> <li>Draws general or broad connections or conclusions</li> </ul>	<ul style="list-style-type: none"> <li>Introduces a precise claim that takes an identifiable position</li> <li>Explains background and context of topic/issue</li> <li>Makes specific connections and draws meaningful conclusions</li> </ul>	<ul style="list-style-type: none"> <li>Makes a compelling claim that takes a purposeful position</li> <li>Thoroughly explains background and context of topic/issue</li> <li>Makes insightful connections, draws meaningful conclusions, and raises important implications</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>There are general statements and no meaningful examples to support the thesis/theme/topic</li> </ul>	<ul style="list-style-type: none"> <li>The examples used to support the theme are too general and unspecific</li> </ul>	<ul style="list-style-type: none"> <li>Paragraphs contain specific examples from the student's life to support their claims and plans for the future</li> </ul>	<ul style="list-style-type: none"> <li>Paragraphs contain specific, important and insightful examples from the student's life that justify the argument</li> </ul>
<b>Audience/Purpose</b>	<ul style="list-style-type: none"> <li>Illustrates an inconsistent awareness of the audience's knowledge level and needs</li> <li>The reader is confused</li> <li>"So what?" remains a question</li> </ul>	<ul style="list-style-type: none"> <li>Considers the needs of the audience (including knowledge level, concerns, values)</li> <li>The effect on the reader &amp; direction of the writer is apparent</li> <li>The answer to "So what?" is superficial</li> </ul>	<ul style="list-style-type: none"> <li>Addresses the needs of the audience (including knowledge level, concerns, values)</li> <li>The reader understands more or less what the writer envisioned and gains a</li> </ul>	<ul style="list-style-type: none"> <li>Addresses the specific needs of the audience (including knowledge level, concerns, values)</li> <li>The reader can understand the writer's message easily and gain significant insight</li> <li>The writer answers: "So what?" with authenticity</li> </ul>



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.

The videos in this link (<http://mytonomy.com/categories/testimonials/the-common-app-strategies-and-common-pitfalls-2-421>) can guide you through specific parts of the Common App.

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](http://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.

## Instructions

Use the powerpoint and student handout with highlights & tips for specific sections of the Common Application.

The videos in this link (<http://mytonomy.com/categories/testimonials/the-common-app-strategies-and-common-pitfalls-2-421>) can guide you through specific parts of the Common App.

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")

## **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 their 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.

# COUNSELOR GUIDE TO THE APPLICATION

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.

<b>PROFILE</b>	<p><b>Contacts</b> <i>Email address, phone number, mailing address</i></p> <p><b>Demographics</b> <i>Religion, military service, race/ethnicity (all optional)</i></p> <p><b>Geography</b> <i>Birthplace, countries lived in, language proficiency, citizenship</i></p>
<b>FAMILY</b>	<p><b>Household</b> <i>Parent marital status, parent(s) with whom you reside</i></p> <p><b>Parent and/or Guardian</b> <i>Name, birthplace, occupation, education, stepparent information</i></p> <p><b>Siblings</b> <i>Age, grade, education</i></p>
<b>EDUCATION</b>	<p><b>School</b> <i>Current school, dates attended; counselor name, phone, and email</i></p> <p><b>History</b> <i>Previous schools, dates attended, past/pending education interruptions (e.g. time off, early graduation, gap year, etc.), college courses, college assistance programs</i></p> <p><b>Academic Information</b> <i>GPA, class rank, current year courses, honors and awards</i></p>
<b>TESTING</b>	<p><b>College Entrance</b> <i>ACT and SAT</i></p> <p><b>English For Non-Native Speakers</b> <i>TOEFL, IELTS, PTE Academic</i></p> <p><b>Academic Subjects</b> <i>AP, IB, SAT Subject Tests, A-Levels</i></p> <p><b>Other</b> <i>Optional reporting for other relevant 9-12 testing</i></p>
<b>ACTIVITIES</b>	<p><b>Principal Activities/Work</b> <i>Years of participation, hours per week, weeks per year, position/leadership held (50 characters), brief description (150 characters). 10 activities maximum.</i></p>

<b>ESSAY</b>	<p><b>Select One, 650 Words Maximum</b></p> <ul style="list-style-type: none"> <li>• 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.</li> <li>• Recount an incident or time when you experienced failure. How did it affect you, and what lessons did you learn?</li> <li>• Reflect on a time when you challenged a belief or idea. What prompted you to act? Would you make the same decision again?</li> <li>• Describe a place or environment where you are perfectly content. What do you do or experience there, and why is it meaningful to you?</li> <li>• Discuss an accomplishment or event, formal or informal, that marked your transition from childhood to adulthood within your culture, community, or family.</li> </ul>
<b>EXPLANATIONS</b>	<p><b>Required Responses</b></p> <p>Explanations regarding school discipline<sup>1</sup>, criminal history<sup>2</sup>, education interruption, veteran discharge status</p>
<b>ADDITIONAL INFO</b>	<p><b>Optional Responses</b></p> <p>Relevant circumstances or qualifications not reflected elsewhere in the application</p>
<b>COLLEGE PAGE 1</b>	<p><b>General</b></p> <p>Entry term, degree status, housing preference, test-optional preference, scholarship and financial aid preference</p> <p><b>Academics</b></p> <p>Academic interest, program(s) applying to</p> <p><b>Contacts</b></p> <p>Interactions with the institution (campus visit, off-campus interview, etc.)</p> <p><b>Family</b></p> <p>Family members who have attended or been employed by the institution</p> <p><b>Evaluations</b></p> <p>Names of classroom teachers, coaches, other recommenders</p> <p><b>Residence</b></p> <p>Required by some public institutions to determine in-state status</p> <p><b>Signature</b></p> <p>Acknowledgments and affirmations</p> <p>(Not all member colleges will ask all questions.)</p>
<b>COLLEGE PAGE 2</b>	<p><b>Writing Supplement</b></p> <p>Additional short answer or essay responses if requested by institution</p>

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](https://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](https://commonapp.org).
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](http://collegeboard.com) and/or [ACT.com](http://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.

### Suggested Grade Level:

11, 12

### 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/>

### Approximate Time Needed:

Varies

### 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](http://www.commonapp.org) for information as it 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

## 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.

## Common App Essay Teacher Guide

<b>Warm Up/Connection:</b>	Think about and discuss: <i>What makes something you read memorable?</i>
<b>Explain:</b>	<p>Describe:</p> <ul style="list-style-type: none"> <li>• 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.):             <ul style="list-style-type: none"> <li>○ transcript</li> <li>○ writing</li> <li>○ extra curricular activities</li> <li>○ test scores</li> </ul> </li> <li>• Write for yourself or someone you know/care about. Not for an admissions officer.</li> <li>• It's a window into who you are as a person.</li> <li>• Make it memorable.</li> </ul>
<b>Model:</b>	<ol style="list-style-type: none"> <li>1. Students read the Common App essay prompts:             <ul style="list-style-type: none"> <li>• 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.</li> <li>• Recount an incident or time when you experienced failure. How did it affect you, and what lessons did you learn?</li> <li>• Reflect on a time when you challenged a belief or idea. What prompted you to act? Would you make the same decision again?</li> <li>• Describe a place or environment where you are perfectly content. What do you do or experience there, and why is it meaningful to you?</li> <li>• Discuss an accomplishment or event, formal or informal, that marked your transition from childhood to adulthood within your culture, community, or family.</li> </ul> </li> <li>2. Choose one more more essay examples that have been released by colleges: <a href="#">Johns Hopkins</a>, <a href="#">Connecticut College</a> (or elsewhere) to share with students.</li> <li>3. Students read the example.</li> </ol>
<b>Guided Practice:</b>	<ol style="list-style-type: none"> <li>1. Ask students, in pairs or triads, to locate and discuss evidence of what makes this a strong</li> </ol>

	<p>essay.</p> <ol style="list-style-type: none"> <li>2. Have students share out their ideas.</li> <li>3. Discuss the list and field questions.</li> <li>4. Add any additional important points to the list.</li> <li>5. Record this list for students to access later.</li> </ol>
<b>Independent Practice:</b>	<p>If students already have a 1st draft:</p> <ol style="list-style-type: none"> <li>1. Students read the current version of their college essay and brainstorm ways to improve it.</li> <li>2. Work on revising or completely rewriting their college essay.</li> </ol> <p>If students don't have a 1st draft:</p> <ol style="list-style-type: none"> <li>1. Students brainstorm topics</li> <li>2. Start drafting essay</li> </ol> <p>Extension ideas:</p> <ul style="list-style-type: none"> <li>• Continue brainstorming topics</li> <li>• Look at the <a href="#">Common App</a> prompts, <a href="#">UC Personal Statement prompts</a>, <a href="#">CSU EOP prompts</a> or a specific <a href="#">scholarship prompt</a> to see where their essay can fit - and start tailoring it to that specific prompt.</li> <li>• Hook exercises</li> <li>• Check back to make sure their essays meet the criteria in the list the group created</li> <li>• Peer editing</li> </ul>
<b>Reflection:</b>	<p>What have you changed about your essay?</p> <p>What is your next step for your college essay?</p>



## 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)

Scoring Domain	Emerging	Developing	Proficient	Advanced
<b>Claim</b>	<ul style="list-style-type: none"> <li>Contains an unidentifiable claim or vague position</li> <li>Does not explain background and context of topic/issue</li> <li>Draws superficial connections or conclusions</li> </ul>	<ul style="list-style-type: none"> <li>Introduces a claim that takes a position</li> <li>Somewhat explains background and context of topic/issue</li> <li>Draws general or broad connections or conclusions</li> </ul>	<ul style="list-style-type: none"> <li>Introduces a precise claim that takes an identifiable position</li> <li>Explains background and context of topic/issue</li> <li>Makes specific connections and draws meaningful conclusions</li> </ul>	<ul style="list-style-type: none"> <li>Makes a compelling claim that takes a purposeful position</li> <li>Thoroughly explains background and context of topic/issue</li> <li>Makes insightful connections, draws meaningful conclusions, and raises important implications</li> </ul>
<b>Evidence</b>	<ul style="list-style-type: none"> <li>There are general statements and no meaningful examples to support the thesis/theme/topic</li> </ul>	<ul style="list-style-type: none"> <li>The examples used to support the theme are too general and unspecific</li> </ul>	<ul style="list-style-type: none"> <li>Paragraphs contain specific examples from the student's life to support their claims and plans for the future</li> </ul>	<ul style="list-style-type: none"> <li>Paragraphs contain specific, important and insightful examples from the student's life that justify the argument</li> </ul>
<b>Audience/Purpose</b>	<ul style="list-style-type: none"> <li>Illustrates an inconsistent awareness of the audience's knowledge level and needs</li> <li>The reader is confused</li> <li>"So what?" remains a question</li> </ul>	<ul style="list-style-type: none"> <li>Considers the needs of the audience (including knowledge level, concerns, values)</li> <li>The effect on the reader &amp; direction of the writer is apparent</li> <li>The answer to "So what?" is superficial</li> </ul>	<ul style="list-style-type: none"> <li>Addresses the needs of the audience (including knowledge level, concerns, values)</li> <li>The reader understands more or less what the writer envisioned and gains a</li> </ul>	<ul style="list-style-type: none"> <li>Addresses the specific needs of the audience (including knowledge level, concerns, values)</li> <li>The reader can understand the writer's message easily and gain significant insight</li> <li>The writer answers: "So what?" with authenticity</li> </ul>



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

## EARLY DECISION

## FIRST-YEAR REQUIREMENTS & DEADLINES

## HOW TO APPLY

# Apply to Community College

# Checklist Task:

## Enroll in Community College

<b>Purpose</b>	<b>Suggested Grade Level:</b>
The purpose of this activity is to inform students about how to enroll in their local community college.	12
<b>Materials and Handouts</b>	<b>Approximate Time Needed:</b>
CA Community Colleges Presentation	Varies
<b>Student-Facing Instructions</b>	
Follow this presentation to assist you as you prepare to enroll in a community college.	
<b>Teacher Notes</b>	
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.	
<b>Assessment</b>	
Completion of community college enrollment as verified email of enrollment confirmation.	

## Instructions

Follow this presentation to assist you as you prepare to enroll in a community college.



# CA COMMUNITY COLLEGES

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Spring 2015



# Bay Area Community Colleges



College of San Mateo  
**BULLDOGS**



**Skyline**  
COLLEGE  
**ACHIEVE**

*A World of Cultures  
United in Learning*



**Foothill College**  
*Upgrade. Advance.*





# Costs

College	Appx Annual Cost*	Cost Breakdown**	
Canada College	<b>\$2,569</b>	<b>\$828</b> <b>\$1,681</b> <b>\$60</b>	Tuition books fees
College of San Mateo	<b>\$3,056</b>	<b>\$1,344</b> <b>\$1,638</b> <b>\$74</b>	Tuition books fees
Foothill College	<b>\$3,201</b>	<b>\$1,395</b> <b>\$1,665</b> <b>\$141</b>	Tuition books fees
San Jose City College	<b>\$2,984</b>	<b>\$1,288</b> <b>\$1,665</b> <b>\$31</b>	Tuition books fees

**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:
  - a. Canada College: <http://canadacollege.edu/assessment/prepare.php>
  - b. San Jose City College: <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:

Monday, April 20, 2015	4:00 p.m. – 8:00p.m
Tuesday, April 21, 2015	4:00 p.m. – 8:00p.m.
Wednesday, April 22, 2015	4:00 p.m. – 8:00p.m.
Thursday, April 23, 2015	4:00 p.m. – 8:00p.m.

<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

Canada College			
Program	For Whom?	What does it offer?	Application Process
<b>“Beating the Odds” Peer Mentorship Program</b>	1 <sup>st</sup> generation college students	<ul style="list-style-type: none"> <li>✓ One-on-one peer support</li> <li>✓ Learn about various resources on campus</li> <li>✓ Important college deadlines</li> <li>✓ Help with how to develop college success strategies</li> <li>✓ Financial aid services</li> <li>✓ College tours</li> </ul>	Enroll in the fall. You must be enrolled in at least 6 units. Application online.
<b>EOPS (Extended Opportunity Programs &amp; Services)</b>	Low-income	<ul style="list-style-type: none"> <li>✓ Counseling</li> <li>✓ priority registration</li> <li>✓ book services</li> <li>✓ Workshops</li> <li>✓ transfer services</li> <li>✓ Other types of support</li> </ul>	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

College of San Mateo			
Program	For Whom?	About the Program	Application Process
<b>Multi-cultural Center</b>	all students, regardless of background.	<ul style="list-style-type: none"> <li>✓ Academic/personal counseling, general financial aid information.</li> <li>✓ UC Personal Statement and Scholarship workshops.</li> <li>✓ Counselors work with students on enhancing time management strategies, improving study skills, and securing campus and community resources.</li> </ul>	N/A
<b>Puente Project</b>	<ul style="list-style-type: none"> <li>✓ Will enroll in ENGL 838 or 848</li> <li>✓ Motivated to transfer</li> <li>✓ Interested in Latino Literature and experiences</li> </ul>	<p>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:</p> <ul style="list-style-type: none"> <li>✓ Enroll in four-year universities</li> <li>✓ Earn college degrees</li> <li>✓ Return to the community as leaders and mentors</li> </ul>	Complete interest form (download from website) now!
<b>EOPS (Extended Opportunity Programs &amp; Services)</b>	<ul style="list-style-type: none"> <li>✓ Low income</li> <li>✓ have placed in a basic skills math or English course</li> </ul>	<ul style="list-style-type: none"> <li>✓ Providing access to higher education for individuals challenged by academic and socioeconomic barriers.</li> </ul>	Apply in the fall: be enrolled with 12 units. See multi-step application process online and contact EOPS office for appointment.

# Support Programs - some examples

San Jose City College			
Program	For Whom?	About the Program	Application Process
<b>Umoja</b>	✓ African American Students eligible for English 92	✓ Ensure student retention and persistence through graduation and the transfer process.	Complete an Umoja student profile and follow the instructions online.
<b>Puente Project</b>	✓ 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!
<b>EOPS (Extended Opportunity Programs &amp; Services)</b>	✓ 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:
  - ☐ 1<sup>st</sup> 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 2<sup>nd</sup> 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.



# Sports & Clubs

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.

### Suggested Grade Level:

12

### Materials and Handouts

[www.applytexas.org](http://www.applytexas.org)

### Approximate Time Needed:

Varies

### Student-Facing Instructions

1. Go to [www.applytexas.org](http://www.applytexas.org).
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](http://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.

## Instructions

1. Go to [www.applytexas.org](http://www.applytexas.org).
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.

[https://www.applytexas.org/adappc/gen/c\\_start.WBX](https://www.applytexas.org/adappc/gen/c_start.WBX)

[About ApplyTexas](#)
[Help](#)
[Counselors & Administrators log in here »](#)

## Explore. Apply. Repeat.

**Research your options.**  
Admission information for every Texas Public University, plus some private and two-year schools.  
[Begin your search »](#)

**Apply online.**  
Complete and submit your admission and scholarship applications online.  
[Get started now »](#)  
[Preview the 2016-2017 applications »](#)  
[Preview the 2015-2016 applications »](#)

**Do it again.**  
No need to start from scratch. Copy a completed application and use it to apply to another school.  
[Learn how »](#)

First time here? No problem.  
**[Get started »](#)**

It's fast. It's easy.  
It's free.  
[Create your account now »](#)

Already have an account?  
**Log in now**

username  
 password  
[Forgot your username or password?](#)

Last updated **July 07 , 2015**  
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**Inspiration**

I am strong. I am independent. I am ready for my career. I support my family. I want to go to college. I am a leader of tomorrow. I am Generation TX. Learn more at [gentx.org](http://gentx.org)

**Information**

What tests do I need to take to go to college? How will I pay for tuition? How do I apply for financial aid? Get answers to these and other questions about preparing for the college application process at [collegeforalltexas.com](http://collegeforalltexas.com).

**Exploration**

There are so many colleges, how do I know which is best fit for me? Compare colleges side-by-side on key measures such as tuition & fees, completion rates, and average salaries after college. Start exploring now at [comparecollege.tx.com](http://comparecollege.tx.com)



# 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/applysuny/)  
<http://www.suny.edu/attend/apply-to-suny/suny-online-academic-record-soar/>

### Approximate Time Needed:

Varies

### Student-Facing Instructions

1. Go to [www.suny.edu/applysuny/](http://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/](http://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](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.

## Instructions

1. Go to [www.suny.edu/applysuny/](http://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/>

https://www.suny.edu/applysunny/

SUNY.edu

Get Help

Discover Opportunities

Find your campus & major before you begin.

[Search for majors.](#)

[View Campuses](#) that accept this application.

Apply for Admission

Complete and submit your undergraduate application or [complete worksheet](#) first.

Submit your Academic Record

Submit your grades and test scores.

[Learn more.](#)

Be part of SOMETHING BIGGER

First time here?  
Get started

Already have an account?  
Log in

Create your account now >>

Email

Password

[Forgot password?](#)

Login

[Disclosures](#)

[Return to SUNY Student Website](#)

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584

[www.suny.edu/attend/apply-to-suny/suny-online-academic-record-soar/](#)

System.SUNY.edu

SUNY A-Z

ATTEND SUNY

WHAT IS SUNY?

WHY DOES SUNY MATTER?

The State University of New York

Apply

Campuses

Programs

ATTEND SUNY / APPLY TO SUNY / SUNY ONLINE ACADEMIC RECORD (SOAR)

Attend SUNY

Get Started

Apply to SUNY

How to Apply

Supplemental Applications

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.

### Suggested Grade Level:

12

### Materials and Handouts

<http://www.cuny.edu/admissions/undergraduate/prepare.html>  
<http://www.cuny.edu/admissions/apply.html>

### Approximate Time Needed:

Varies

### Student-Facing Instructions

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.

### Teacher Notes

This lesson is specific to the City Universities of New York. Refer to <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.

## Instructions

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.



[www.cuny.edu/admissions/apply.html](#)

[Find It](#)
[College Websites](#)
[Text Version](#)
[Make This Website Talk](#)

[Future Students](#)
[Current Students](#)
[Faculty/Staff](#)
[Alumni](#)

[ABOUT](#)
[ACADEMICS](#)
[ADMISSIONS](#)
[FINANCIAL AID](#)
[RESEARCH](#)
[NEWS/EVENTS](#)
[LIBRARIES](#)
[EMPLOYMENT](#)
[SEARCH](#)
[LOG-IN](#)

Welcome >> Admissions >> **Apply to CUNY**

## Apply to CUNY

Undergraduate Applicant

Graduate Applicant

Visiting Student

Continuing Education

Before you apply, visit [cuny.edu/prepare](http://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 >>**

### Application Tutorials


588



# Undergraduate Preparation

<http://www.cuny.edu/admissions/undergraduate/prepare.html>

www2.cuny.edu/admissions/undergraduate/prepare/



The City University of New York

CU NY

The City University of New York

Home » Admissions » Undergraduate Admissions » Prepare

Prepare - The City University of New York

ABOUT

ACADEMICS

ADMISSIONS

FINANCIAL AID

RESEARCH

NEWS/EVENTS

LIBRARIES

EMPLOYMENT

LOG-IN

SEARCH

Find It

College Websites

Text Version

Future Students

Current Students

Faculty/Staff

Alumni

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

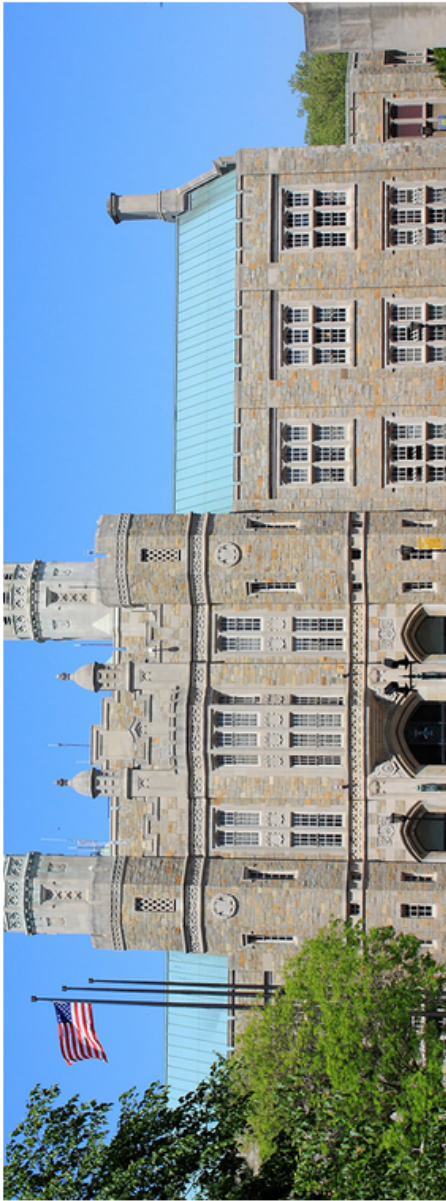
Ask CUNY

AskCUNY

Type a question or keyword above.

TODAY'S NEWS

The Fall 2016 Admission Application Is Now Available.



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.

589

**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.

## 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.

## Checklist to Secure College Enrollment

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:					
To Do:	Date/ Deadline	Notes	Done?	Where do I go...	Name of Office or Building
Placement Test/Asses sment				To take placement tests?	
Tuition & Fees Payment				To pay for my classes?	
Register for Orientation				For financial aid questions and info?	
Meet with My Counselor				For Orientation?	

Register for Classes						To meet with my counselor?	
Drop/Add a Class						To register for and Drop/Add my classes?	

California State University:							
To Do:	Date/Deadline	Notes	Done?				
Statement of Intent to Register (SIR) Submitted	May 1st				Where do I go...	Name of Office or Building	
Placement Testing: <a href="#">EAP/ELM/</a> <a href="#">EPT</a>					To take placement tests?		
Registered for <a href="#">Early Start Program</a>					To pay for my classes?		
					For financial aid questions and info?		





University of California:						
To Do:	Date/ Deadline	Notes	Done?			
Statement of Intent to Register (SIR) Submitted	May 1st			Where do I go...	Name of Office or Building	
Placement Testing				To take placement tests?		
SAT/ACT Scores Submitted				To pay for my classes?		
Final Transcript Sent				For financial aid info?		
Tuition & Fees Payment				For Orientation?		
Housing/ Dorm Secured				To meet with my counselor?		
Register for Orientation				To register for and Drop/Add my classes?		
Register for Classes				For dorm information?		
				To get a parking		



Tuition & Fees Payment					To meet with my counselor?	
Housing/Dorm Secured					To register for and Drop/Add my classes?	
Register for Orientation					For dorm information?	
Register for Classes					To get a parking permit?	
Drop/Add a Class						

# 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

## Materials and Handouts

How is College Different  
What's the Difference

## Approximate Time Needed:

50 minutes

## 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?

FOLLOWING THE RULES IN HIGH SCHOOL	CHOOSING RESPONSIBLY IN COLLEGE
High school is <i>mandatory</i> and usually <i>free</i> .	College is <i>voluntary</i> and <i>expensive</i> .
Your time is structured by others.	You manage your own time.
You need permission to participate in extracurricular activities	You must decide whether to participate in co-curricular activities.
You can count on parents and teachers to remind you of your responsibilities and to guide you in setting priorities.	<i>You</i> must balance your responsibilities and set priorities. You will face moral and ethical decisions you have never faced before.
Each day you proceed from one class directly to another, spending 6 hours each day--30 hours a week--in class.	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
Most of your classes are arranged for you.	You arrange your own schedule in consultation with your adviser. Schedules tend to look lighter than they really are.
You are not responsible for knowing what it takes to graduate.	Graduation requirements are complex, and differ from year to year. You are expected to know those that apply to you.
<b>* Guiding principle: You will usually be told what to do and corrected if your behavior is out of line.</b>	<b>* 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.</b>
GOING TO HIGH SCHOOL CLASSES	SUCCEEDING IN COLLEGE CLASSES
The school year is 36 weeks long; some classes extend over both semesters and some don't.	The academic year is typically divided into two separate 15-week semesters, plus a week after each semester for exams.
Classes generally have no more than 35 students.	Classes may number 100 students or more.
You may study outside class as little as 0 to 2 hours a week, and this may be mostly last-minute test preparation.	You need to study at least 2 to 3 hours outside of class for each hour in class.



You seldom need to read anything more than once, and sometimes listening in class is enough.	You need to review class notes and text material regularly.
You are expected to read short assignments that are then discussed, and often re-taught, in class.	You are assigned substantial amounts of reading and writing which may not be directly addressed in class.
<b>* Guiding principle: You will usually be told in class what you need to learn from assigned readings.</b>	<b>* 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.</b>
<b>HIGH SCHOOL TEACHERS</b>	<b>COLLEGE PROFESSORS</b>
Teachers check your completed homework.	Professors may not always check completed homework, but they will assume you can perform the same tasks on tests.
Teachers remind you of your incomplete work.	Professors may not remind you of incomplete work.
Teachers approach you if they believe you need assistance.	Professors are usually open and helpful, but most expect you to initiate contact if you need assistance.
Teachers are often available for conversation before, during, or after class.	Professors expect and want you to attend their scheduled office hours.
Teachers have been trained in teaching methods to assist in imparting knowledge to students.	Professors have been trained as experts in their particular areas of research.
Teachers provide you with information you missed when you were absent.	Professors expect you to get from classmates any notes from classes you missed.
Teachers present material to help you understand the material in the textbook.	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 <i>you</i> to relate the classes to the textbook readings.
Teachers often write information on the board to be copied in your notes.	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.





Teachers impart knowledge and facts, sometimes drawing direct connections and leading you through the thinking process.	Professors expect you to think about and synthesize seemingly unrelated topics.
Teachers often take time to remind you of assignments and due dates.	Professors expect you to read, save, and consult the course syllabus (outline); the syllabus spells out exactly what is expected of you, when it is due, and how you will be graded.
Teachers carefully monitor class attendance.	Professors may not formally take roll, but they are still likely to know whether or not you attended.
<b>* Guiding principle: High school is a teaching environment in which you acquire facts and skills.</b>	<b>* Guiding principle: College is a learning environment in which you take responsibility for thinking through and applying what you have learned.</b>
TESTS IN HIGH SCHOOL	TESTS IN COLLEGE
Testing is frequent and covers small amounts of material.	Testing is usually infrequent and may be cumulative, covering large amounts of material. You, not the professor, need to organize the material to prepare for the test. A particular course may have only 2 or 3 tests in a semester.
Makeup tests are often available.	Makeup tests are seldom an option; if they are, you need to request them.
Teachers frequently rearrange test dates to avoid conflict with school events.	Professors in different courses usually schedule tests without regard to the demands of other courses or outside activities.
Teachers frequently conduct review sessions, pointing out the most important concepts.	Professors rarely offer review sessions, and when they do, they expect you to be an active participant, one who comes prepared with questions.
<b>* 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.</b>	<b>* Guiding principle: Mastery is often seen as the ability to apply what you've learned to new situations or to solve new kinds of problems.</b>



GRADES IN HIGH SCHOOL	GRADES IN COLLEGE
Grades are given for most assigned work.	Grades may not be provided for all assigned work.
Consistently good homework grades may raise your overall grade when test grades are low.	Grades on tests and major papers usually provide most of the course grade.
Extra credit projects are often available to help you raise your grade.	Extra credit projects cannot, generally speaking, be used to raise a grade in a college course.
Initial test grades, especially when they are low, may not have an adverse effect on your final grade.	Watch out for your <i>first</i> tests. These are usually "wake-up calls" 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.
You may graduate as long as you have passed all required courses with a grade of D or higher.	You may graduate only if your average in classes meets the departmental standard--typically a 2.0 or C.
* <b>Guiding principle: <i>Effort counts</i>.</b> Courses are usually structured to reward a "good-faith effort."	* <b>Guiding principle: <i>Results count</i>.</b> Though "good-faith effort" is important in regard to the professor's willingness to help you <i>achieve</i> good results, it will not <i>substitute</i> for results in the grading process.



# What's the Difference?

Write down all the ways you think college will be different from high school



# Finishing Strong: Planning Your First Term

## 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.

## Suggested Grade Level:

12

## Materials and Handouts

Benefits of Orientation  
Planning First Term Schedule  
How to Make the Transition to College

## Approximate Time Needed:

50 minutes

## 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

## 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/yourfreshmanyar/planningyourfirsttermcollegeschedule](http://www.ecampustours.com/campuslife/yourfreshmanyar/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/yourfreshmanyar/planningyourfirsttermcollegeschedule](http://www.ecampustours.com/campuslife/yourfreshmanyar/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” 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.

## Assessment

### 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.**

Expense Type	Definition	High School Expenses	College Expenses	Post-College Expenses
Fixed	<i>A necessary expense that stays at a fixed rate</i>	<ul style="list-style-type: none"> <li>Cell Phone Bill</li> </ul>	<ul style="list-style-type: none"> <li>Tuition</li> <li>Cell Phone Bill</li> </ul>	<ul style="list-style-type: none"> <li>Rent</li> <li>Cell Phone Bill</li> <li>Health Insurance</li> <li>Car Insurance</li> <li>Parking Permit</li> <li>Loan Payments</li> </ul>
Flexible	<i>A necessary expense that can fluctuate in cost; you have some control over how much you want to spend</i>	<ul style="list-style-type: none"> <li>Public Transportation</li> <li>Haircuts</li> </ul>	<ul style="list-style-type: none"> <li>Books and Supplies</li> <li>Computer</li> <li>Room and Board</li> <li>Furniture/Appliances</li> <li>Groceries</li> <li>Public Transportation</li> <li>Toiletries</li> <li>Haircuts</li> <li>Laundry</li> </ul>	<ul style="list-style-type: none"> <li>Utility Bills</li> <li>Furniture</li> <li>Groceries</li> <li>Gas</li> <li>Car Maintenance</li> <li>Toiletries</li> <li>Haircuts</li> <li>Laundry</li> </ul>
Discretionary	<i>An unnecessary expense; “fun money”</i>	<ul style="list-style-type: none"> <li>Dining Out</li> <li>Clothes/Shoes</li> <li>Movies</li> <li>Gifts</li> <li>Savings</li> </ul>	<ul style="list-style-type: none"> <li>Dining Out</li> <li>Airline Tickets</li> <li>Clothes/Shoes</li> <li>Movies/Concerts</li> <li>Gifts</li> <li>Savings</li> </ul>	<ul style="list-style-type: none"> <li>Dining Out</li> <li>Clothes/Shoes</li> <li>Movies/Concerts</li> <li>Trips</li> <li>Gifts/Donations</li> <li>Savings</li> </ul>

## Instructions

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?

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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.

Expense Type	Definition	High School Expenses	College Expenses	Post-College Expenses
Fixed				
Flexible				
Discretionary				



# Budgeting 103, Part 2: Life Skills - College Budget

## 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.

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.

## Assessment

Completion of worksheet








## 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.

EXPENSE CATEGORY		COST PER ACADEMIC YEAR
<b>EDUCATION</b> 	<b>TUITION AND FEES</b>	\$
	<b>BOOKS AND SUPPLIES</b>	\$
<b>HOUSING AND UTILITIES/BILLS</b> 	<b>HOUSING - SELECT ONE:</b> <input type="radio"/> Housing: On campus <input type="radio"/> Housing: Off campus <input type="radio"/> Housing: At home	\$
	<b>UTILITIES:</b> Electricity, water, cable, internet (included if living on-campus)	\$
	<b>PHONE SERVICES:</b> Phone + Service	\$
<b>FOOD/DINING</b> 	<b>FOOD – SELECT ALL THAT APPLY</b> <input type="radio"/> Meal Plan: \$ _____ <input type="radio"/> Groceries: \$ _____ <input type="radio"/> Dining Out: \$ _____	\$
<b>TRANSPORTATION</b> 	<b>TRANSPORTATION – SELECT ALL THAT APPLY</b> <input type="radio"/> Public Transportation: \$ _____ <input type="radio"/> Vehicle Payments: \$ _____ <input type="radio"/> Gas: \$ _____ <input type="radio"/> Maintenance: \$ _____ <input type="radio"/> Car Insurance: \$ _____ <input type="radio"/> Parking Permit: \$ _____ <input type="radio"/> Airline Tickets: \$ _____	\$
<b>HEALTH INSURANCE</b> 	<b>HEALTH INSURANCE – SELECT ALL THAT APPLY</b> <input type="radio"/> Medical/Vision/Dental: \$ _____ <input type="radio"/> Prescriptions/Medication: \$ _____	\$
<b>PERSONAL</b> 	<b>PERSONAL CARE</b> (include toiletries, haircuts, personal shopping)	\$
	<b>ENTERTAINMENT/RECREATION</b> (include hobbies, going out)	\$
<b>OTHER</b> 	<b>DONATING, GIFTS, AND SAVING – SELECT ALL THAT APPLY</b> <input type="radio"/> Donations: \$ _____ <input type="radio"/> Gifts: \$ _____ <input type="radio"/> Savings: \$ _____	\$
<b>TOTAL:</b>		\$

## COLLEGE COSTS

### COST OF ATTENDANCE BY TYPE OF COLLEGE (2014-15) – NORTHERN CALIFORNIA

School	Tuition/ Fees	Book and Supplies	Room/ Board*	Health Insurance	Transportation	Personal	Total Cost of Attendance
Community College: Foothill College**	\$1,500	\$1,746	\$11,646	n/a	\$1,278	3,132	<b>\$19,302</b>
SF State University (In-State Resident)	\$6,468	\$1,826	\$13,052	n/a	\$1,496	\$1,364	<b>\$24,206</b>
SF State University (Out-of-State Resident)***	\$15,396	\$1,826	\$13,052	n/a	\$1,496	\$1,364	<b>\$32,756</b>
UC Santa Cruz (In-State Resident)	\$13,398	\$1,440	\$14,730	\$2,415	\$573	\$1,800	<b>\$34,356</b>
UC Santa Cruz (Out-of-State Resident)	\$36,276	\$1,440	\$14,730	\$2,415	\$573	\$1,800	<b>\$57,234</b>
Santa Clara University (Private)	\$43,812	\$1,746	\$12,921	n/a	\$864	\$2,295	<b>\$61,638</b>

\* 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

Type of School	Tuition/ Fees	Book and Supplies	Room/ Board*	Health Insurance	Transportation	Personal/ Misc.	Total Cost of Attendance
Community College: East Los Angeles College (2013-14)	\$1,220	\$1,710	\$11,268	n/a	\$1,323	\$2,844	<b>\$18,365</b>
Cal State L.A. (In-State Resident)	\$6,343	\$1,809	\$12,627	n/a	\$1,389	\$1,365	<b>\$23,533</b>
Cal State L.A. (Out-of-State Resident)	\$15,271	\$1,809	\$12,627	n/a	\$1,389	\$1,365	<b>\$32,461</b>
UCLA (In-State Resident)	\$12,862	\$1,599	\$14,571	\$1,938	\$585	\$1,638	<b>\$ 33,193</b>
UCLA (Out-of-State Resident)	\$35,740	\$1,599	\$14,571	\$1,938	\$585	\$1,638	<b>\$56,071</b>
University of Southern California (Private)**	\$48,347	\$1,500	\$13,334	n/a	\$580	\$1,000	<b>\$64,761</b>

\* 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.

## 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

## 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:

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The most helpful piece of information I learned was:

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After today's workshop, I plan to:

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HOMEWORK	PRE-WORK FOR WORKSHOP ON:
Share the budget you began working on with your parent(s)/family.	

# Budgeting 202: College Expenses - Personal Budget How-To Guide

## 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

## Materials and Handouts

Personal Budget How To Guide  
Building Your Budget Funding Section  
Intro to Microsoft Excel  
Budgeting 202 2014 15 Personal Budgeting Analysis

## Approximate Time Needed:

40 minutes

## 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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Adapted from the GLOW Foundation Financial Literacy curriculum.  
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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.

## 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.

College 1:	=College 1'!B2	College 2:	=College 2'!B2
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (without Loans)	\$0.00	Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	\$0.00	Financial Gap per Year (without Loans)	\$0.00
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (with Loans)	\$0.00	Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	\$0.00	Financial Gap per Year (with Loans)	\$0.00
College 3:	=College 3'!B2	College 4:	=College 4'!B2
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (without Loans)	\$0.00	Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	\$0.00	Financial Gap per Year (without Loans)	\$0.00
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (with Loans)	\$0.00	Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	\$0.00	Financial Gap per Year (with Loans)	\$0.00

**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**.

College	Description
College 1	Create a budget for the school you <b><i>most want to attend</i></b>
College 2	Create a budget for the school you can <b><i>most easily afford</i></b> (Target: Financial gap of \$2000 or less)
College 3 and 4	Create budgets for other schools you are interested in. Consider listing state schools, private and out-of-state schools, and two-year community colleges.

### **BUILDING YOUR BUDGET – “EX PENSE” 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:

**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.

College 1:

EXPENSES	By Academic Year	By Semester	By Quarter	By Month	Type of Expense	Description
Tuition and Fees						
Books and Supplies (including computer)						
Housing/Rent (see breakdown)						
Housing/Rent						
Utilities: Electricity, Water						
Utilities: Cable, Internet						
Phone: Landline or Mobile Phone						
Home Costs: Furniture, Appliances						

Column Headers	Description
Column A: <b>Expenses</b>	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: <b>By Academic Year</b>	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: <b>By Semester</b>	List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.
Column D: <b>By Quarter</b>	List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.
Column E: <b>By Month</b>	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: <b>Type of Expense</b>	Categorize each expense as “fixed,” flexible,” or “discretionary.”
Column G: <b>Description</b>	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.

EXPENSES	By Academic Year	By Semester	By Quarter	By Month	Type of Expense
Tuition and Fees	\$13,398.00	n/a	\$4,466.00	\$1,488.67	Fixed
Books and Supplies (including computer)	\$1,400.00	n/a	\$466.67	\$155.56	Flexible

**\*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.

Tuition and Fees	<b>GLOW:</b> Along with tuition, include any student association, lab, or application fees
Books and Supplies (including computer)	

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.

A	B	C	D	E	F
EXPENSES	By Academic Year	By Semester	By Quarter	By Month	Type of Expense
Tuition and Fees	\$13,398.00	n/a	=B5/3	\$1,488.67	Fixed

7. **Review Your Expense Total:** As you enter numbers into the spreadsheet, your expense total is calculated in row 44.

## BUILDING YOUR BUDGET – “FUN DI NG ” SEC TI ON :

1. Proceed to the “Income” section of the budget (rows 46-80). Note the headers for this section:

	A	B	C	D	E
45					
46	SECURED FUNDING	By Academic Year	By Semester	By Quarter	By Month
47	Scholarships (see breakdown)				
48	1. (List Name)				
49	2				
50	3				

Column Headers	Description
Column A: <b>Secured Funding</b>	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.
Column B: <b>By Academic Year</b>	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.
Column C: <b>By Semester</b>	List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.
Column D: <b>By Quarter</b>	List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.
Column E: <b>By Month</b>	List the cost for each expense by month. You may need to manipulate your academic year or semester/quarter figures to calculate this.

**\*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.)

	SECURED FUNDING	By Academic Year	By Semester	By Quarter	By Month
46					
47	Scholarships (see breakdown)				
48	1. Smart Cookie Scholarship	\$1,000.00	n/a	\$333.33	\$111.11
49	2. Peninsula College Fund	\$3,000.00	n/a	\$1,000.00	\$333.33
50	3. Hispanic Scholarship Fund	\$1,000.00	n/a	\$333.33	\$111.11
51	4. Bay Area Gardener's Foundation Scholarship	\$500.00	n/a	\$166.67	\$55.56

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.

	SECURED FUNDING	By Academic Year	By Semester	By Quarter	By Month
46					
47	Scholarships (see breakdown)				
48	1. Smart Cookie Scholarship	\$1,000.00	n/a	=B48/3	\$111.11

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.

70	ESTIMATED INCOME TOTAL (without loans):	\$32,042.00	\$0.00	\$10,680.67	\$3,560.22
80	ESTIMATED INCOME TOTAL (with loans):	\$33,542.00	\$0.00	\$11,180.67	\$3,726.89

#### **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.

	Financial Gap (EXPENSE-INCOME)	Maximum Gap / "Worst Case Scenario"			
		By Academic Year	By Semester	By Quarter	By Month
84	FINANCIAL GAP (without loans)	\$1,586.00	\$0.00	\$528.67	\$176.22
85	FINANCIAL GAP (with loans)	\$86.00	\$0.00	\$28.67	\$9.56

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:

<sup>35</sup>  
<sup>17</sup> **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.

<sup>35</sup>  
<sup>17</sup> **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.

<sup>35</sup>  
<sup>17</sup> **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.”

<sup>35</sup>  
<sup>17</sup> **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.

<sup>35</sup>  
<sup>17</sup> **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:

	A	B	C
1	1	3	7
2	4	1	4
3	5	2	3
4	3	1	4
5	3	1	9

Math Function	Formula	Example	Sample Answer
Multiplication	=(click on cell)*(value)	=(C3)*9	=(3)*9 *27
Division	=(click on cell)/(value)	=(C5)/9	=(9)/9 *1
Addition	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)	=sum (B1,B3) =sum(B1:B5)	=sum(3,2) *5 =sum(3:1) *8
Subtraction	=(cell1)-(cell2)	=(A3)-(A1)	=(5)-(1) *4

Student Name:

<b>College 1:</b>	
Expense Total	\$0.00
Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	<b>\$0.00</b>
Expense Total	\$0.00
Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	<b>\$0.00</b>

<b>College 3:</b>	
Expense Total	\$0.00
Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	<b>\$0.00</b>
Expense Total	\$0.00
Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	<b>\$0.00</b>

<b>SAMPLE:</b>	
Expense Total	\$33,628.00
Income Total (without Loans)	\$32,042.00
Financial Gap per Year (without Loans)	<b>\$1,586.00</b>
Expense Total	\$33,628.00
Income Total (with Loans)	\$33,542.00
Financial Gap per Year (with Loans)	<b>\$86.00</b>

<b>College 2:</b>	
Expense Total	
Income Total (without Loans)	
Financial Gap per Year (without Loans)	
Expense Total	
Income Total (with Loans)	
Financial Gap per Year (with Loans)	

<b>College 4:</b>	
Expense Total	
Income Total (without Loans)	
Financial Gap per Year (without Loans)	
Expense Total	
Income Total (with Loans)	
Financial Gap per Year (with Loans)	

## 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

### Materials and Handouts

Personal Budget How To Guide  
Building Your Budget Funding Section  
Intro to Microsoft Excel  
Budgeting 202 2014 15 Personal Budgeting Analysis

### Approximate Time Needed:

40 minutes

### 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"

## 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.

College 1:	=College 1'!B2	College 2:	=College 2'!B2
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (without Loans)	\$0.00	Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	\$0.00	Financial Gap per Year (without Loans)	\$0.00
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (with Loans)	\$0.00	Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	\$0.00	Financial Gap per Year (with Loans)	\$0.00
College 3:	=College 3'!B2	College 4:	=College 4'!B2
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (without Loans)	\$0.00	Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	\$0.00	Financial Gap per Year (without Loans)	\$0.00
Expense Total	\$0.00	Expense Total	\$0.00
Income Total (with Loans)	\$0.00	Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	\$0.00	Financial Gap per Year (with Loans)	\$0.00

**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**.

College	Description
College 1	Create a budget for the school you <b><i>most want to attend</i></b>
College 2	Create a budget for the school you can <b><i>most easily afford</i></b> (Target: Financial gap of \$2000 or less)
College 3 and 4	Create budgets for other schools you are interested in. Consider listing state schools, private and out-of-state schools, and two-year community colleges.

### **BUILDING YOUR BUDGET – “EX P E N S E” S E C T I O N :**

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:

**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.

College 1:

EXPENSES	By Academic Year	By Semester	By Quarter	By Month	Type of Expense	Description
Tuition and Fees						
Books and Supplies (including computer)						
Housing/Rent (see breakdown)						
Housing/Rent						
Utilities: Electricity, Water						
Utilities: Cable, Internet						
Phone: Landline or Mobile Phone						
Home Costs: Furniture, Appliances						

Column Headers	Description
Column A: <b>Expenses</b>	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: <b>By Academic Year</b>	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: <b>By Semester</b>	List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.
Column D: <b>By Quarter</b>	List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.
Column E: <b>By Month</b>	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: <b>Type of Expense</b>	Categorize each expense as “fixed,” flexible,” or “discretionary.”
Column G: <b>Description</b>	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.

EXPENSES	By Academic Year	By Semester	By Quarter	By Month	Type of Expense
Tuition and Fees	\$13,398.00	n/a	\$4,466.00	\$1,488.67	Fixed
Books and Supplies (including computer)	\$1,400.00	n/a	\$466.67	\$155.56	Flexible

**\*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.

Tuition and Fees	<b>GLOW:</b> Along with tuition, include any student association, lab, or application fees
Books and Supplies (including computer)	

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.

A	B	C	D	E	F
EXPENSES	By Academic Year	By Semester	By Quarter	By Month	Type of Expense
Tuition and Fees	\$13,398.00	n/a	=B5/3	\$1,488.67	Fixed

7. **Review Your Expense Total:** As you enter numbers into the spreadsheet, your expense total is calculated in row 44.



## BUILDING YOUR BUDGET – “FUN DI NG ” SEC TI ON :

1. Proceed to the “Income” section of the budget (rows 46-80). Note the headers for this section:

	A	B	C	D	E
45					
46	SECURED FUNDING	By Academic Year	By Semester	By Quarter	By Month
47	Scholarships (see breakdown)				
48	1. (List Name)				
49	2				
50	3				

Column Headers	Description
Column A: <b>Secured Funding</b>	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.
Column B: <b>By Academic Year</b>	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.
Column C: <b>By Semester</b>	List the cost for each expense by semester. You may need to manipulate your academic year or monthly figures to calculate this.
Column D: <b>By Quarter</b>	List the cost for each expense by quarter. You may need to manipulate your academic year or monthly figures to calculate this.
Column E: <b>By Month</b>	List the cost for each expense by month. You may need to manipulate your academic year or semester/quarter figures to calculate this.

**\*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.)

	SECURED FUNDING	By Academic Year	By Semester	By Quarter	By Month
46					
47	Scholarships (see breakdown)				
48	1. Smart Cookie Scholarship	\$1,000.00	n/a	\$333.33	\$111.11
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51	4. Bay Area Gardener's Foundation Scholarship	\$500.00	n/a	\$166.67	\$55.56

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.

	SECURED FUNDING	By Academic Year	By Semester	By Quarter	By Month
46					
47	Scholarships (see breakdown)				
48	1. Smart Cookie Scholarship	\$1,000.00	n/a	=B48/3	\$111.11

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.

70	ESTIMATED INCOME TOTAL (without loans):	\$32,042.00	\$0.00	\$10,680.67	\$3,560.22
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#### **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.

	Financial Gap (EXPENSE-INCOME)	Maximum Gap / "Worst Case Scenario"			
		By Academic Year	By Semester	By Quarter	By Month
82					
83					
84	FINANCIAL GAP (without loans)	\$1,586.00	\$0.00	\$528.67	\$176.22
85	FINANCIAL GAP (with loans)	\$86.00	\$0.00	\$28.67	\$9.56

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.

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### 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:

<sup>35</sup>  
<sup>17</sup> **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.

<sup>35</sup>  
<sup>17</sup> **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.

<sup>35</sup>  
<sup>17</sup> **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.”

<sup>35</sup>  
<sup>17</sup> **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.

<sup>35</sup>  
<sup>17</sup> **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:

	A	B	C
1	1	3	7
2	4	1	4
3	5	2	3
4	3	1	4
5	3	1	9

Math Function	Formula	Example	Sample Answer
Multiplication	=(click on cell)*(value)	=(C3)*9	=(3)*9 *27
Division	=(click on cell)/(value)	=(C5)/9	=(9)/9 *1
Addition	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)	=sum (B1,B3) =sum(B1:B5)	=sum(3,2) *5 =sum(3:1) *8
Subtraction	=(cell1)-(cell2)	=(A3)-(A1)	=(5)-(1) *4

Student Name:

<b>College 1:</b>	
Expense Total	\$0.00
Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	<b>\$0.00</b>
Expense Total	\$0.00
Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	<b>\$0.00</b>

<b>College 3:</b>	
Expense Total	\$0.00
Income Total (without Loans)	\$0.00
Financial Gap per Year (without Loans)	<b>\$0.00</b>
Expense Total	\$0.00
Income Total (with Loans)	\$0.00
Financial Gap per Year (with Loans)	<b>\$0.00</b>

<b>SAMPLE:</b>	
Expense Total	\$33,628.00
Income Total (without Loans)	\$32,042.00
Financial Gap per Year (without Loans)	<b>\$1,586.00</b>
Expense Total	\$33,628.00
Income Total (with Loans)	\$33,542.00
Financial Gap per Year (with Loans)	<b>\$86.00</b>

<b>College 2:</b>	
Expense Total	
Income Total (without Loans)	
Financial Gap per Year (without Loans)	
Expense Total	
Income Total (with Loans)	
Financial Gap per Year (with Loans)	

<b>College 4:</b>	
Expense Total	
Income Total (without Loans)	
Financial Gap per Year (without Loans)	
Expense Total	
Income Total (with Loans)	
Financial Gap per Year (with Loans)	