TO: The Semester Conversion Steering Committee  
FROM: Glen Perry, Administrative Support Subcommittee Chair  
SUBJECT: Change of Summer from Leading to Trailing Term beginning with the 17-18 Financial Aid Year  
PURPOSE: That the SCSC approve this recommendation to the Executive Sponsors of Semester Conversion  
ACTION REQUESTED: That the President authorize a change in definition of the financial aid year for disbursement of aid to begin in Fall 2017.

The President’s authorization of this recommendation would change the leading term for financial aid disbursement from Summer 2017 to Fall 2017, and would change the trailing term from Spring 2018 to Summer 2018.

BACKGROUND INFORMATION: Each year, the Department of Education and various State entities allocate annual dollars to fund student financial aid programs. Currently, our policy defines Summer Quarter as the first, or leading, term in the aid year. This means that summer term begins the new financial aid year, and it is the first term during which students are funded from the current (new) year’s allocation. Conversely, a trailing summer term indicates that summer is the last term students will be funded from a financial aid year’s allocation.

During the campus fit-gap analysis of the readiness for CSU East Bay to proceed with our semester conversion initiative and the opportunities for business process improvements, the consulting firm endorsed the proposed change that summer become the ‘trailing’ term in our financial aid year. Similar conclusions have been reached at other CSU campuses in the process of calendar conversion. Moreover our Executive Director for Student Financial Aid has consulted with the financial aid offices at several CSU campuses where such a change was made. See Attachment A.

In addition, year-round financial aid recipients have expressed frustration with the current leading summer structure, which frequently results in diminished spring term aid eligibility for students who begin their academic year enrollment in summer. For these students, a trailing summer will optimize available aid during fall and spring semesters which is where we see the most robust enrollment. A trailing summer will still allow year-round students with remaining aid year eligibility to receive Federal aid during a self-supported summer term.

The decline in state-supported year-round operations on campus coupled with the move of summer enrollments into self-support special sessions has changed the emphasis on student aid funding to focus on the regular academic year and to fund summer students using available non-state aid.

Our students sometime express that exhausting annual aid eligibility at the end of spring is more desirable than exhausting eligibility at the end of winter. Continuing with a leading summer will continue to expose students to the possible of being left with diminished aid eligibility when they reach spring semester. A trailing summer will still allow students with remaining eligibility to receive federal aid during a summer self-support term.