

# TRUSTEES OF THE CALIFORNIA STATE UNIVERSITY

California State University  
Office of the Chancellor—Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, CA 90802

## Agenda July 13-14, 2021

Time**	Committee	Location <sup>1</sup>
<b><i>TUESDAY, JULY 13, 2021</i></b>		
9:00 a.m.	<b><u>Board of Trustees—Closed Session</u></b> Executive Personnel Matters Government Code §11126(a)(1)  Pending Litigation Government Code §11126(e)(1) Higley, et al. v. CSU, et al. Vakilzadeh v. CSU Anticipated Litigation	
9:40 a.m.	<b><u>Committee on Collective Bargaining—Closed Session</u></b> Government Code §3596(d)	
10:00 a.m.	<b><u>Public Comment—Open Session</u></b>	
11:30 a.m.	<b><u>Committee on Audit Consent</u></b> <i>Action</i> 1. Approval of Minutes <i>Information</i> 2. Status Report on Audit and Advisory Services Activities <i>Information</i> 3. Report on Financial Statements Audit Corrective Actions	

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<sup>1</sup> The July 13-14, 2021 meeting will take place entirely virtually via teleconference.

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***TUESDAY, JULY 13, 2021 (cont.)***

**11:35 a.m.     Committee on Finance**

**Consent**

*Action*

1. Approval of Minutes

*Information*

2. Reporting of Auxiliary Liquidity Loans Approved by the Chancellor under Delegated Authority

**Discussion**

*Information*

3. 2021-2022 Final Budget

**12:15 p.m.     Lunch Break**

**12:45 p.m.     Committee on Educational Policy**

**Consent**

*Action*

1. Approval of Minutes

*Action*

2. Commission on the Extended University

*Information*

3. Amendment to Title 5 Regulations: Credit for Prior Learning

**Discussion**

*Information*

4. Recovery with Equity: A Roadmap for Higher Education After the Pandemic

*Information*

5. Graduation Initiative 2025

*Information*

6. The Post-Pandemic Student Experience

**2:15 p.m.     Committee on Institutional Advancement**

**Consent**

*Action*

1. Approval of Minutes

**Discussion**

*Action*

2. Naming of The KPBS Conrad Prebys Media Complex – San Diego State University

*Action*

3. Naming of Prebys Stage – San Diego State University

*Action*

4. Naming of the CSU Shiley Haynes Institute for Palliative Care

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***TUESDAY, JULY 13, 2021 (cont.)***

**2:45 p.m.      Committee on Governmental Relations**

**Consent**

*Action*            1. Approval of Minutes

**Discussion**

*Information*    2. State Legislative Update

**3:15 p.m.      Committee on University and Faculty Personnel**

**Consent**

*Action*            1. Approval of Minutes

**Discussion**

*Action*            2. Executive Compensation: Executive Vice Chancellor for Academic and Student Affairs – California State University

**3:30 p.m.      Committee of the Whole**

**Consent**

*Action*            1. Approval of Minutes

**Discussion**

*Action*            2. Conferral of Title of Student Trustee Emerita—Maryana Khames

***WEDNESDAY, JULY 14, 2021***

**9:00 a.m.      Board of Trustees**

**Call to Order**

**Roll Call**

**Chair's Report**

**Chancellor's Report**

**Academic Senate CSU Report: *Chair—Robert Keith Collins***

**California State Student Association Report: *President—Isaac Alferos***

**California State University Alumni Council Report: *President—Jeremy Addis-Mills***

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**WEDNESDAY, JULY 14, 2021 (cont.)**

**Consent**

*Action* 1. Approval of the Minutes of the Board of Trustees Meeting of May 19, 2021

*Action* 2. Approval of Committee Resolutions as follows:

**Committee on Educational Policy**

2. Commission on the Extended University

**Committee on Institutional Advancement**

2. Naming of The KPBS Conrad Prebys Media Complex – San Diego State University

3. Naming of Prebys Stage – San Diego State University

4. Naming of the CSU Shiley Haynes Institute for Palliative Care

**Committee on University and Faculty Personnel**

2. Executive Compensation: Executive Vice Chancellor for Academic and Student Affairs – California State University

**Committee of the Whole**

2. Conferral of Title of Student Trustee Emerita—Maryana Khames

**10:15 a.m. Board of Trustees—Closed Session**

Executive Personnel Matters

Government Code §11126(a)(1)

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## REVISED

### Addressing the Board of Trustees

**\*PLEASE NOTE:** Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, the Board of Trustees meeting will take place entirely virtually on Tuesday, July 13, 2021, and Wednesday, July 14, 2021. Members of the board will participate in this meeting remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the Dumke Auditorium will not be open to the public during the meeting, and no Trustees or staff will be present in the Auditorium. **Therefore, there will be no public access to the previously noticed meeting site and no in-person public comment.**

Members of the public will still have full opportunity to observe the meeting and to offer public comment as follows:

- Members of the public are encouraged to watch the meeting via [livestream](#) through the Board of Trustees website.
- All public comment (for all committee and plenary sessions) will take place on Tuesday, July 13 at the start of the Board of Trustees' open sessions (**scheduled to begin at approximately 10:00 a.m.**).
- **Written comments may be e-mailed in advance of the meeting by 12:00 p.m. on Monday, July 12 to [trusteesecretariat@calstate.edu](mailto:trusteesecretariat@calstate.edu).** To the extent possible all written comments will be distributed to members of the Board, or its appropriate committee, prior to the beginning of the Board or committee meeting.
- **Members of the public who wish to offer public comment *during the meeting* may do so virtually/telephonically by providing written request in advance, including their telephone number, by 12:00 p.m. on Monday, July 12 to [trusteesecretariat@calstate.edu](mailto:trusteesecretariat@calstate.edu).** The request should also identify the agenda item the speaker wishes to address, or if the speaker wishes to address the full Board in the plenary session, the notice should state the subject of the intended presentation. The trustee secretariat will call the number provided during the public comment portion for the committee requested. Efforts will be made to accommodate each individual who has requested to speak.

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Public comments must relate to an item on the committee's agenda. Members of the public may also address the full Board of Trustees during the plenary session on any non-agendized topic that is related to the University. The purpose of public comments is to provide information to the board, and not to evoke an exchange with board members. Questions that board members may have resulting from public comments will be referred to appropriate staff for response.

In fairness to all speakers who wish to speak, and to allow the committees and board to hear from as many speakers as possible, while at the same time conducting the public business of their meetings within the time available, **public comment will be limited to 1 minute per speaker**. Ceding, pooling or yielding remaining time to other speakers is not permitted. Speakers are requested to make the best use of the public comment opportunity and to follow the rules established.

Trustee Secretariat  
Office of the Chancellor  
401 Golden Shore  
Long Beach, CA 90802  
Phone: 562-951-4020

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## **AGENDA**

### **COMMITTEE ON AUDIT**

**Meeting:**     **11:30 a.m., Tuesday, July 13, 2021**  
                  **Virtually via Teleconference**

Adam Day, Chair  
Jane W. Carney, Vice Chair  
Jack McGrory  
Anna Ortiz-Morfit  
Krystal Raynes  
Lateefah Simon

**Consent**     1. Approval of Minutes of the Meeting of May 18, 2021, *Action*  
                  2. Status Report on Audit and Advisory Services Activities, *Information*  
                  3. Report on Financial Statements Audit Corrective Actions, *Information*

**MINUTES OF THE MEETING OF  
COMMITTEE ON AUDIT**

**Trustees of the California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 18, 2021**

**Members Present**

Adam Day, Chair  
Jane W. Carney, Vice Chair  
Silas H. Abrego  
Jean P. Firstenberg  
Jack McGrory  
Anna Ortiz-Morfit  
Peter J. Taylor  
Lillian Kimbell, Chair of the Board

Trustee Jane W. Carney called the meeting to order.

**Approval of Minutes**

The minutes of March 23, 2021 were approved as submitted.

**Status Report on Audit and Advisory Services Activities**

Trustee Romey Sabalius inquired about commenting on the item and Trustee Carney removed the item from the consent agenda for discussion. Trustee Sabalius expressed appreciation and commended Vlad Marinescu, vice chancellor and chief audit officer, for including an attachment outlining the audit topics.

The consent agenda was approved.

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## **Fiscal Year 2021-2022 Audit Plan**

In accordance with the Audit Committee charter, Vice Chancellor Marinescu presented the annual audit plan for fiscal year 2021-2022 to the committee for review and approval. Each year, Audit and Advisory Services engages in an annual audit planning process to develop a comprehensive risk-based audit plan that addresses both systemwide risks and individual campus-specific risks. The 2021 audit plan consists of five primary functional areas: assurance audits and data analytics, advisory services, investigations and intergovernmental audits, outreach and engagement, and audit support.

The foundation of the plan is focused on the core support areas of Finance and Administration; Information Technology; and Compliance, Human Resources and Risk Management. The second segment of the plan is focused on Academic Administration; Student Activities and Services; and University Relations and Advancement. The final segment of the plan focuses on auxiliary organizations. Although the audit topics are organized into organizational area categories, there is overlap between categories for many of the reviews that are planned. A brief description of each planned audit topic is included in Attachment A of the agenda item.

The assurance audits portion of the audit plan also includes data analytics and continuous auditing, which allows for monitoring and reviewing large data sets for anomalies and trends with a high degree of automation. It also assists with the existing audit process. By using a continuous auditing approach, control testing and monitoring can be performed on a more frequent or continuous basis, as opposed to a traditional audit approach, in which a particular area may only be covered once every three or four years.

Approximately 20 percent of staff resources are allocated toward advisory services. For these consultative reviews, Audit and Advisory Services partners with management to identify solutions for business issues, offer opportunities to improve the efficiency and effectiveness of operating areas, and assist with special requests, while ensuring the consideration of related internal control issues.

Resources are also allocated for investigations and the coordinating of intergovernmental audits. The investigations unit of Audit and Advisory Services acts as a liaison and representative for the CSU system throughout the intergovernmental audit process. For audits of the CSU performed by the California State Auditor, Audit and Advisory Services helps facilitate communication between the State Auditor, the chancellor's office, and any applicable campuses. Because the need for investigations fluctuates depending on when issues and allegations come to the attention of administrators, investigations resources are also deployed to perform advisory work targeted toward fraud risk and prevention, as time allows.

The last major area of the audit plan includes outreach and engagement. Although audit and advisory work naturally requires quite a bit of outreach and engagement, the audit plan allocates additional resources to ensure that Audit and Advisory Services is partnering and working with

stakeholders beyond what would be the usual course of business for an audit or advisory review. This includes activities such as participating in and leading affinity groups, providing support and guidance to campus and chancellor's office management, sharing information and common themes across campuses, and acknowledging feedback and insights provided by management. Outreach and engagement activities also include educational activities such as providing fraud prevention and awareness training for staff throughout the system and providing students with work experience and exposure to the audit profession.

Following the presentation, the trustees discussed the audit plan. Trustees expressed support for building the data analytics program and inquired about the allocation of resources toward audits of auxiliary organizations and emphasized coverage for this area.

The Fiscal Year 2021-2022 Audit Plan was approved.

Trustee Carney adjourned the Committee on Audit.

## **COMMITTEE ON AUDIT**

### **Status Report on Audit and Advisory Services Activities**

#### **Presentation By**

Vlad Marinescu  
Vice Chancellor and Chief Audit Officer  
Audit and Advisory Services

#### **Summary**

This item provides an update on internal audit activities and initiatives. It also includes a status report on both the 2020-2021 and 2021-2022 audit plans, as well as follow-up on completed audit assignments. Follow-up on current and past assignments is being conducted on approximately 33 completed campus reviews. Attachment A summarizes the status of audit assignments by campus.

For both the 2020-2021 audit plan year and 2021-2022 audit plan, assignments were made to execute individual campus audit plans and conduct financial, operational, compliance, and information technology audits; use continuous auditing techniques and data analytics tools; and provide advisory services and investigation reviews.

## **AUDITS**

### **Status of In-Process and Completed Audits**

Audit and Advisory Services is wrapping up work on the 2020-2021 audit plan and has commenced work on the 2021-2022 audit plan. Thirty-six audits have been completed as part of the 2020-2021 audit plan and the remaining 2020-2021 audits are progressing through the report writing and campus review process. Fieldwork has begun for 2021-2022 audits and is being performed remotely. Audit management is currently evaluating when in-person on site fieldwork will resume. Completed audit reports are posted on the California State University website at <https://www2.calstate.edu/csu-system/transparency-accountability/audit-reports>.

The status of campus progress toward implementing recommendations for completed 2020-2021 audits is included in Attachment A. Prior year audits that have open recommendations are also included in Attachment A and are removed from the report the meeting following all recommendations having shown as completed.

Both campus management and audit management are responsible for tracking the implementation/completion status of audit recommendations contained in campus audit reports.

During the audit process, campus management identifies a target completion date for addressing each audit recommendation. Target completion dates are subject to approval by audit management prior to the audit report being finalized. Implementation timelines are reviewed for appropriateness, reasonableness, and timeliness, which also includes evaluating the nature and level of risk and whether any mitigating controls can or should be implemented on an interim basis while audit recommendations are being implemented.

If there are difficulties or unexpected delays in addressing/completing audit recommendations within the agreed upon timeframes, escalation processes for resolution are followed by audit management. Audit management first contacts the campus senior leadership team (president and/or VP/CFO) to resolve any delays. In rare instances in which delays cannot be resolved during discussions between campus and audit management, the chancellor and audit committee chair and/or vice chair may help resolve delays, as needed.

#### Continuous Auditing and Data Analytics

Audit and Advisory Services has completed the second round of credit card reviews at all 23 campuses and the chancellor's office. Based on the results of the reviews, credit card tests have been identified for automation, and quarterly reports on credit card data trends and analyses are being developed to share with campuses on an on-going basis.

Fieldwork has been completed for the review of human resources/payroll at two campuses for the current audit plan year, and data validation at two additional campuses is currently in progress.

A process has been implemented to incorporate data analytics into all audits. The data analytics team provides input in the planning stage of each audit of available data, and feasible analytics tests that can be performed.

### ADVISORY SERVICES

Audit and Advisory Services partners with management to identify solutions for business issues, offer opportunities to improve the efficiency and effectiveness of operating areas, and assist with special requests, while ensuring the consideration of related internal control issues. Advisory services are more consultative in nature than traditional audits and are performed in response to requests from campus management. The goal is to enhance awareness of risk, control and compliance issues and to provide a proactive independent review and appraisal of specifically identified concerns. Reviews are ongoing and work is being performed remotely.

## INVESTIGATIONS AND INTERGOVERNMENTAL AUDITS

Audit and Advisory Services is periodically called upon to provide investigative reviews, which are often the result of alleged misappropriations or conflicts of interest. Investigations are performed on an ongoing basis, both at the request of an individual campus or the chancellor's office and by referral from the state auditor. Additionally, the investigations unit tracks external audits being conducted by state and federal agencies, acts as a liaison for the system throughout the audit process, and offers assistance to campuses undergoing such audits.

The California State Auditor (CSA) recently identified 18 state agencies, including the California State University (CSU), that are responsible for managing a portion of federal COVID-19 funds. The CSU and University of California are among the entities being audited regarding the administration of these funds. The audit is currently underway and will evaluate the role of the Chancellor's Office in overseeing the funds and providing guidance to the campuses on their use. The funds are administered at the campus level, and as a result the CSA has selected three CSU campuses to review: Chico, Long Beach, and Sonoma.

Last year the investigations unit began providing fraud awareness and prevention training throughout the CSU system. The fraud awareness and prevention training program shares insights and common findings from investigations. Investigations often involve allegations related to travel and hospitality claims and procurement card transactions, so the program highlights CSU-specific examples that cover each of those areas and provides practical guidance on how to prevent and detect fraud. Since fall 2020, presentations have been made to 14 campuses and various systemwide affinity groups, and more than 1,300 employees throughout the system have participated in the training program, including presidents, chief administrators, business officers, campus audit liaisons, and academic personnel such as department chairs, deans, and provosts.

## Status Report on Current and Past Audit Assignments

Campus	Category	Audit Topic	Audit Plan Year	Total # of Recommendations	*Status
Bakersfield	Status of Recommendations	Cloud Computing	2020	2	2
		Housing and Residential Services	2020	5	5
Chancellor's Office	Audits Currently in Progress	Procurement	2020		
Channel Islands	Status of Recommendations	Faculty Assigned Time and Additional Employment	2019	4	4
		Conference Services	2020	2	1 1
		Information Security	2020	9	9
Chico	Audits Currently in Progress	Academic Personnel	2020		
Dominguez Hills	Audits Currently in Progress	Accounts Payable & Disbursements	2020		
	Status of Recommendations	Post Award Administration	2020	6	6
East Bay	Audits Currently in Progress	Facilities Management	2020		
		Information Security	2020		
Fresno	Audits Currently in Progress	Faculty Assigned Time and Additional Employment	2020		
	Status of Recommendations	Professional and Continuing Education	2020	3	3
Fullerton	Audits Currently in Progress	Faculty Assigned Time and Additional Employment	2020		
	No Reportable Recommendations	Service Learning	2020	n/a	
Humboldt	Status of Recommendations	Facilities Management	2020	6	6
		Procurement	2020	1	1
		University Center	2020	14	7 7
Long Beach	Status of Recommendations	Foundation	2020	3	3
	No Reportable Recommendations	Accounts Payable & Disbursements	2020	n/a	
Los Angeles	Audits Currently in Progress	Information Security	2020		
	Status of Recommendations	Faculty Assigned Time and Additional Employment	2020	3	3
Maritime Academy	Audits Currently in Progress	Service Learning and Internships	2020		
	Status of Recommendations	Foundation	2020	8	8
Monterey Bay	Status of Recommendations	Information Security	2020	11	11
		Professional and Continuing Education	2020	2	2
Northridge	Audits Currently in Progress	Service Learning and Internships	2020		
Pomona	Audits Currently in Progress	Auxiliary-Owned Housing	2021		
	Status of Recommendations	Housing and Residential Services	2020	4	4
	No Reportable Recommendations	Procurement	2020	n/a	
Sacramento	Audits Currently in Progress	Service Learning	2021		
	Status of Recommendations	Professional and Continuing Education	2020	3	3
	No Reportable Recommendations	Accounts Payable & Disbursements	2020	n/a	

**\*Status**

Closed (green) - Recommendations have been satisfactorily implemented

Open (blue) - Implementation of recommendations is in progress and within the agreed upon timeframe

Exceeds Agreed Upon Timeframe (red) - Recommendations have not been implemented within the agreed upon timeframe

Report as of June 22, 2021

## Status Report on Current and Past Audit Assignments

Campus	Category	Audit Topic	Audit Plan Year	Total # of Recommendations	*Status
San Bernardino	Audits Currently in Progress	Facilities Management	2020		
	Status of Recommendations	Philanthropic Foundation	2020	6	<div><div>6</div></div>
		Post Award Administration	2020	6	<div><div>5</div><div>1</div></div>
San Diego	Audits Currently in Progress	Information Security	2020		
		Procurement	2020		
	Status of Recommendations	Emergency Management	2020	7	<div><div>7</div></div>
San Francisco	Audits Currently in Progress	Endowment Management	2021		
	Status of Recommendations	Emergency Management	2019	11	<div><div>10</div><div>1</div></div>
		Facilities Management	2020	3	<div><div>3</div></div>
		Minors on Campus	2020	5	<div><div>5</div></div>
San Jose	Audits Currently in Progress	Counseling and Psychology Services	2021		
	Status of Recommendations	Construction Management	2020	4	<div><div>4</div></div>
		Fundraising and Gift Processing	2020	3	<div><div>3</div></div>
		Professional and Continuing Education	2020	5	<div><div>5</div></div>
San Luis Obispo	Audits Currently in Progress	Information Security	2020		
	Status of Recommendations	Associated Students, Inc.	2020	5	<div><div>5</div></div>
		Construction Management	2020	6	<div><div>6</div></div>
		Housing and Residential Services	2020	12	<div><div>12</div></div>
San Marcos	Audits Currently in Progress	Associated Students, Inc.	2020		
		Information Security	2020		
	Status of Recommendations	Emergency Management	2020	6	<div><div>6</div></div>
Sonoma	Status of Recommendations	Accessible Technology	2020	5	<div><div>5</div></div>
	No Reportable Recommendations	Travel and Hospitality	2020	n/a	
Stanislaus	Audits Currently in Progress	Credit Cards	2020		
	Status of Recommendations	Cloud Computing	2020	2	<div><div>2</div></div>
		Emergency Management	2020	4	<div><div>4</div></div>

**\*Status**

**Closed (green)** - Recommendations have been satisfactorily implemented

**Open (blue)** - Implementation of recommendations is in progress and within the agreed upon timeframe

**Exceeds Agreed Upon Timeframe (red)** - Recommendations have not been implemented within the agreed upon timeframe

Report as of June 22, 2021

## **COMMITTEE ON AUDIT**

### **Report on Financial Statements Audit Corrective Actions**

#### **Presentation By**

Mary Ek  
Assistant Vice Chancellor/Controller  
Financial Services

#### **Summary**

As presented at the March 2021 California State University Board of Trustees meeting, each component unit conducts individual audits and nine of the 91 component units (mostly auxiliary organizations) were found to have a mix of material weaknesses and significant deficiencies in internal controls over financial reporting. All component units have provided documentation of corrective actions taken.

Additionally, there were findings of minor financial materiality from the Single Audit of Federal Awards audit and campuses have provided documentation of corrective actions taken.

The Chancellor's Office Financial Services and Audit and Advisory Services have reviewed documentary evidence provided by auxiliary organizations and campuses and have confirmed completion of corrective actions to respond to findings from the component unit audits and the Single Audit.



## AGENDA

### COMMITTEE ON FINANCE

**Meeting:** 11:35 a.m., Tuesday, July 13, 2021  
Virtually via Teleconference

Jack McGrory, Chair  
Larry L. Adamson, Vice Chair  
Jane W. Carney  
Wenda Fong  
Anna Ortiz-Morfit  
Krystal Raynes  
Romey Sabalius  
Christopher Steinhauser

- Consent**
1. Approval of Minutes of the Meeting of May 18, 2021, *Action*
  2. Reporting of Auxiliary Liquidity Loans Approved by the Chancellor under Delegated Authority, *Information*
- Discussion**
3. 2021-2022 Final Budget, *Information*

**MINUTES OF THE MEETING OF THE  
COMMITTEE ON FINANCE**

**Trustees of the California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 18, 2021**

**Members Present**

Jack McGrory, Chair  
Peter J. Taylor, Vice Chair  
Larry L. Adamson  
Jane W. Carney  
Jack Clarke, Jr.  
Wenda Fong  
Maryana Khames  
Anna Ortiz-Morfit  
Krystal Raynes  
Lateefah Simon

Lillian Kimbell, Chair of the Board  
Joseph I. Castro, Chancellor

Trustee Jack McGrory called the meeting to order.

**Public Comment**

Public comment took place at the beginning of the meeting's open session, prior to all committees.

**Approval of the Consent Agenda**

The minutes of the March 23, 2021 meeting of the Committee on Finance were approved as submitted.

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the May 17-19, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**

Item number two, California State University, Monterey Bay Conceptual Approval of a Public-Private Partnership Mixed-Use Development Project, was approved as submitted (RFIN 05-21-02).

Item number three, California State University Annual Debt Report, was an information item.

Item number four, California State University Quarterly Investment Report, was an information item.

### **2021-2022 Operating Budget Update**

Information about Governor Newsom's May revision proposal was shared. It proposes \$514.9 million in recurring operating funds and \$325 million in one-time funds for the CSU. Proposals to convert Humboldt State University into a polytechnic university and for an equity innovation hub at CSU Northridge were also included. Key details from the Senate and Assembly budget plans were highlighted.

Following the presentation, the trustees asked about the \$4 billion proposed by the state for student housing. Assistant Vice Chancellor for Budget Ryan Storm informed them that allocation and implementation details are not yet worked out. Funds may involve grants and could be prioritized for new construction or possibly to convert nearby commercial space into student housing.

The trustees expressed excitement about the additional funding being proposed by the governor, as well as the potential for a multi-year budget agreement. It was requested that if passed, the joint committee on Finance and Campus, Buildings, and Grounds discuss the planned uses of one-time funds for facilities and the approach for affordable student housing. Opportunities for efficiency and to collaborate with the California Community Colleges on housing were also mentioned.

### **Auxiliary Organizations**

Information about auxiliary organizations and their purpose at the CSU was presented. They provide a wide variety of essential services that include student unions, bookstores, dining, childcare centers, and public radio. Auxiliaries also directly benefit students and provide them with opportunities to serve in student government or as board members, participate in research projects, on campus employment, and paid internships in their field of study. Information about auxiliary reporting requirements, their governing boards and rules, and contributions and revenues was shared.

Following the presentation, the trustees had no questions.

Trustee McGrory adjourned the meeting of the Committee on Finance.

## **COMMITTEE ON FINANCE**

### **Reporting of Auxiliary Liquidity Loans Approved by the Chancellor under Delegated Authority**

#### **Presentation By**

Steve Relyea  
Executive Vice Chancellor and  
Chief Financial Officer

Robert Eaton  
Assistant Vice Chancellor  
Financing, Treasury, and Risk Management

#### **Summary**

This item provides information to the California State University Board of Trustees on auxiliary liquidity loans that have been approved by the Chancellor under delegated authority.

#### **Background**

The Board of Trustees' CSU Policy for Financing Activities (RFIN/CPBG 11-14-01), as well as the Financing and Debt Management Policy (Executive Order 994) issued by the Chancellor pursuant to the CSU Policy for Financing Activities, stipulates that all borrowing by the CSU or any CSU auxiliary shall be made through the CSU's established debt programs (e.g., the CSU's Systemwide Revenue Bond and commercial paper programs) and approved by the Board of Trustees. The policy and executive order also recognize that there may be certain types of financing structures that are not well suited for the CSU's established debt programs. In such cases, the proposed financing structure shall be reviewed by the Chancellor's Office and then presented to the Board of Trustees for approval.

At its November 2020 meeting, the Board of Trustees revised the CSU Board of Trustees' Standing Orders to delegate authority to the Chancellor to approve auxiliary liquidity borrowings outside of the CSU's established debt programs, subject to the following parameters:

- Maximum amount: \$40,000,000.
- Maximum length of any borrowing, loan, or line of credit: Ten years.
- All auxiliary liquidity loans will comply with all legal and CSU policy requirements.
- Final terms and conditions of any auxiliary borrowing agreement established under this delegated authority shall not contain any provisions that will have a material adverse

impact upon the CSU's established debt programs or upon any financing already provided to such auxiliary through the CSU's established debt programs.

- Any auxiliary financings approved under this delegated authority will be reported to the Board of Trustees at each meeting of the Board of Trustees.
- The delegation of authority to the Chancellor to approve auxiliary liquidity loans will expire on November 18, 2023.

### **Auxiliary Liquidity Loans Approved by the Chancellor under the Delegated Authority**

In June 2021, two auxiliary liquidity loans were approved by the Chancellor. Both approvals being reported herein are for the renewal of lines of credit that have been in place for a number of years and do not represent new auxiliary liquidity borrowing in response to COVID-19.

#### The Cal Poly Pomona Foundation, Inc. (CPPF) at California State Polytechnic University, Pomona

As part of its several areas of operation in support of the California State Polytechnic University, Pomona campus, CPPF provides dining, bookstore, apartment style housing, and other enterprise and administrative services to the campus. In the course of its normal business operations, CPPF will sometimes experience a gap in its cash flow position due to the seasonality in its receivables to meet current expenses. This approval allowed CPPF to renew an existing line of credit facility (matured June 25, 2021) to provide additional liquid resources and meet its working capital needs.

The key proposed terms of the line of credit from Wells Fargo Bank are as follows:

- The amount of the line of credit will be up to \$6 million.
- The term of the loan will be 364 days from document closing.
- The interest rate on the loan will be variable, equal to the London Interbank Offered Rate (LIBOR) plus 1.5 percent. (As of June 30, 2021, the three month LIBOR rate was 0.13 percent).
- The line of credit will require continual maintenance of CPPF's short-term and investment assets of not less than \$10 million.

#### San Diego State University Research Foundation (SDSURF) at San Diego State University

As part of its several areas of operation in support of the San Diego State University campus, SDSURF provides administrative services of grants and contracts for sponsored programs to the campus. In the course of its business operations, and since most grants and contracts are on a cost reimbursable basis, SDSURF has needed to utilize its own cash resources for up to 60 days prior to receiving repayment from granting agencies. To maintain additional liquid resources and meet its working capital needs, this approval allows SDSURF to renew an existing line of credit of facility (maturing September 26, 2021), which has not been drawn upon since its inception in 2006.

The key proposed terms of the line of credit from First Republic Bank (FRB) are as follows:

- The amount of the line of credit will be up to \$15 million, of which \$12 million will be made available under a working capital line of credit and \$3 million shall be a sublimit for a standby letter of credit.
- The term of the line of credit facility will be 5 years from document closing, with an expected maturity date of September 26, 2026.
- The interest rate is variable equal to the Wall Street Journal prime rate minus 1 percent with an interest rate floor of 2.5 percent. (As of June 30, 2021, the Wall Street Journal Prime Rate was 3.25 percent)
- Debt service coverage ratio of 1.25 for all outstanding debt, including debt with the CSU as well as FRB.
- The line of credit will require continual maintenance of certain SDSURF's minimum unrestricted liquid assets of \$8 million.
- The line of credit facility is secured by a deed of trust and lien on two real estate properties owned by SDSURF.

## **COMMITTEE ON FINANCE**

### **2021-2022 Final Budget**

#### **Presentation By**

Steve Relyea  
Executive Vice Chancellor and  
Chief Financial Officer

Ryan Storm  
Assistant Vice Chancellor  
Budget

#### **Summary**

This agenda item summarizes final budget-related decisions made by the State of California for fiscal year 2021-2022 affecting the CSU operating budget.

#### **Background**

Since the May Board of Trustees meeting, there have been several important developments on the 2021-2022 state budget. The governor's May Revision proposal concluded that the significant economic recovery has created a multi-year state budget surplus of \$75.7 billion dollars, supplemented by \$25 billion in added one-time federal support. Combined, these revenues are equivalent to two-thirds of the state's annual general fund budget.

As a result, the governor proposed the following significant items for the CSU:

- The governor provided a \$74.4 million recurring state General Fund unallocated increase in support of the Board of Trustees priorities such as Graduation Initiative 2025 and mandatory cost increases. This complemented the \$111.5 million proposed in January for the same purpose. Together, they total \$185.9 million.
- The governor proposed a \$458 million investment to convert Humboldt State University to a polytechnic university. This included \$433 million in one-time funding to improve facilities and infrastructure and \$25 million recurring in support of ongoing operating costs.
- The governor proposed \$25 million in one-time funding to support construction of a Center for Equity in Innovation and Technology on the Northridge campus.

On June 14, 2021, the state legislature adopted a bicameral budget agreement and proposed the following significant items for the CSU:

- Concurrence with the governor's proposals of \$185.9 million recurring in support of the Board of Trustees budget priorities.
- \$50 million recurring to increase teacher preparation programs at CSU campuses.
- \$338 million to convert Humboldt State University to a polytechnic university. This included \$313 million in one-time funding to improve facilities and infrastructure and \$25 million recurring in support of ongoing operating costs.
- Also, the legislature proposed or adopted other facility and infrastructure projects supported by one-time funding, which include:
  - The Center for Equity in Innovation and Technology at Northridge (\$25 million).
  - Infrastructure improvements at Dominguez Hills (\$60 million).
  - A building replacement at Stanislaus' Stockton Center (\$54 million).
- The stated intent to add recurring funding in 2022-2023 to increase resident student enrollment by an estimated 9,434 full-time equivalent students.

In summary, the governor's plan would have increased the CSU's recurring funding by \$549 million and the legislature's plan would have increased the CSU's recurring funding by \$598 million.

### **CSU and the Final Budget Agreement**

On June 25, 2021, the governor, senate president pro tempore, and assembly speaker reached a three-party consensus on the 2021-2022 state budget. This final budget agreement struck a compromise on the CSU recurring operating budget and included several one-time augmentations.

On the operating budget, the agreement increased the recurring CSU operating budget by \$550.1 million above 2020-2021 levels—all from the state general fund. This included a \$299 million funding restoration, an unallocated increase of \$185.9 million in support of the Board of Trustees priorities such as Graduation Initiative 2025 and mandatory cost increases, \$30 million to support student basic needs and mental health, and \$25 million for recurring operating costs related to the conversion of the Humboldt campus to a polytechnic. In total, recurring state support for the CSU operating budget now stands at \$4.2 billion.

The final budget agreement also included several, one-time increases in support of other state leadership priorities including \$325 million for deferred maintenance and infrastructure needs, \$433 million for facilities and infrastructure related to the conversion of the Humboldt campus to a polytechnic, \$140 million to several campuses for a variety of physical improvements, and \$31.3 million to several campuses for a variety of programmatic improvements.



The following tables capture the items included in the Board of Trustees budget request for the 2021-2022 fiscal year and the items funded by the state Budget Act of 2021.

<b>Recurring Sources of Funds</b>	<b>Request</b>	<b>Final Budget</b>
• State General Fund	\$556.0	\$550.1
<b>Total Incremental Recurring Sources of Funds</b>	<b>\$556.0</b>	<b>\$550.1</b>

<b>Recurring Uses of Funds</b>	<b>Request</b>	<b>Final Budget</b>
• Restoration of 2020-2021 General Fund Reductions	\$299.0	\$299.0
• Graduation Initiative 2025: Highest Campus Priorities	120.0	120.0
• Graduation Initiative 2025: Basic Needs Initiative	30.0	15.0
• Graduation Initiative 2025: Student Mental Health	-	15.0
• Academic Facilities & Infrastructure	50.0	-
• Mandatory Costs	57.0	55.3
• Operating Costs for Polytechnic Transition at Humboldt	-	25.0
• Other Costs	-	10.6
• Summer Term Financial Aid	-	6.0
• Learning Management System	-	2.0
• Stockton Center Enrollment Growth at Stanislaus	-	1.0
• Mervyn Dymally Institute at Dominguez Hills	-	1.0
• Cost Increases for Corporation for Education Network Initiatives in California	-	0.2
<b>Total Incremental Recurring Uses of Funds</b>	<b>\$556.0</b>	<b>\$550.1</b>

<b>One-Time Sources of Funds</b>	<b>Request</b>	<b>Final Budget</b>
• State General Fund	\$1,200.0	\$976.3
<b>Total Incremental One-Time Sources of Funds</b>	<b>\$1,200.0</b>	<b>\$976.3</b>

<b>One-Time Uses of Funds</b>	<b>Request</b>	<b>Final Budget</b>
• Deferred Maintenance & Infrastructure	\$1,200.0	\$325.0
• Facility Costs for Polytechnic Transition at Humboldt	-	433.0
• Infrastructure Improvements at Dominguez Hills	-	60.0
• Stockton Center Building Replacement at Stanislaus	-	54.0
• Emergency Grant Aid to Students	-	30.0
• Ctr for Equity in Innovation and Technology at Northridge	-	25.0
• Faculty Professional Development and Equal Opportunity Practices	-	10.0
• Computing Talent Initiative at Monterey Bay	-	10.0
• Stop Asian and Pacific Islander Hate at San Francisco	-	10.0
• Nursing and Health Programs at Bakersfield	-	6.0
• Project Rebound	-	5.0
• Nursing Program at Humboldt	-	2.5
• Evaluation of Non-Faculty Staff Existing Salary Structure	-	2.0
• Physician Assistant Program at San Bernardino	-	1.8
• Arboretum at Fullerton	-	1.0
• Pedestrian Bridge at Fullerton	-	1.0
<b>Total Incremental One-Time Uses of Funds</b>	<b>\$1,200.0</b>	<b>\$976.3</b>

There are other significant state budget decisions that will positively impact the CSU in the future. State leaders adopted concepts and set aside funding for such items as campus facilities, student housing, student mental health, and financial aid. It is anticipated that additional detail will emerge from the state later this year. Further, the funding is not directly available to the CSU, but the CSU will be able to apply for grant funding or draw down funding from other state departments and agencies for these purposes. The two most notable items are: A new capacity expansion and affordable student housing program, which will provide \$2 billion in one-time funds to build new campus facilities or expand existing ones at the CSU and the University of California (UC) as well as develop more affordable student housing at the CSU, the UC, and the California Community Colleges. Financial aid changes loosen the age and time out of high school eligibility for the Cal Grant program and larger grant aid for middle and low-income students through the Middle-Class Scholarship Program. The financial aid changes mean that more CSU students will be eligible for state financial aid and that more of their cost of attendance will be covered than in the past.

## **Conclusion**

The state completed its work on the budget for 2021-2022. The state has invested an extraordinary sum in the CSU – \$550 million in recurring funding, nearly \$1 billion in one-time funding, and the CSU is poised to receive hundreds of millions more for facilities, student mental health, student housing, and financial aid. The CSU greatly appreciates all CSU stakeholders' advocacy efforts. These efforts were vital in keeping the CSU a budget priority for legislators and the governor, thereby restoring prior budget cuts, and significantly investing more in the institution and its students.

## AGENDA

### COMMITTEE ON EDUCATIONAL POLICY

**Meeting:** 12:45 p.m., Tuesday, July 13, 2021  
Virtually via Teleconference

Christopher Steinhauser, Chair  
Romey Sabalius, Vice Chair  
Larry L. Adamson  
Diego Arambula  
Jane W. Carney  
Jack Clarke, Jr.  
Douglas Faigin  
Jean P. Firstenberg  
Wenda Fong  
Krystal Raynes

- Consent**
1. Approval of Minutes of the Meeting of May 18, 2021, *Action*
  2. Commission on the Extended University, *Action*
  3. Amendment to Title 5 Regulations: Credit for Prior Learning, *Information*
- Discussion**
4. Recovery with Equity: A Roadmap for Higher Education After the Pandemic, *Information*
  5. Graduation Initiative 2025, *Information*
  6. The Post-Pandemic Student Experience, *Information*

**MINUTES OF MEETING OF  
COMMITTEE ON EDUCATIONAL POLICY**

**Trustees of The California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 18, 2021**

**Members Present  
Virtually via Teleconference**

Wenda Fong, Chair  
Romey Sabalius, Vice Chair  
Silas H. Abrego  
Larry L. Adamson  
Diego Arambula  
Jane W. Carney  
Jack Clarke, Jr.  
Douglas Faigin  
Debra S. Farar  
Maryana Khames  
Christopher Steinhauser

Lillian Kimbell, Chair of the Board  
Joseph I. Castro, Chancellor

Trustee Fong called the meeting to order.

**Approval of Minutes, Action**

The minutes from March 23, 2021 were approved as submitted.

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the May 17-19, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**

### **Post-Pandemic Academic Programs, Information**

The presentation began with opening remarks from executive vice chancellor of Academic and Student Affairs Fred E. Wood. Dr. Wood describing how the CSU used existing innovations and resources to support students, faculty and communities amidst a global pandemic and what is being done to anticipate the needs of a post-pandemic world. Dr. Alison Wrynn, associate vice chancellor for Academic Programs, Innovation and Faculty Development, then provided an overview of the CSU's recent developments in academic programs. Dr. Wrynn reflected on data that indicates positive trends in online education since faculty's early transition to virtual instruction. Additionally, Dr. Wrynn outlined the ways that the pandemic has influenced the academic program planning process to consider student demand, workforce needs and marketplace factors. Dr. Sheila Thomas, assistant vice chancellor, Self-Support Strategy and Partnerships and dean of Professional and Continuing Education (PaCE) concluded the presentation with an in-depth overview of how the programs offered through PaCE are addressing urgent and emerging workforce needs, particularly in the health care industry.

Trustees posed questions regarding examples of CSU centers of excellence and shared services and the trends in early enrollment for the fall 2021 term. In addition, questions regarding the policy for awarding credit for prior learning and the programs target audience, how the CSU is increasing capacity to meet nursing needs in California, addressing the need for internships and apprenticeships were posed. Finally, trustees inquired about the availability of virtual student services after repopulation in the fall and whether online learning can increase course capacity.

## **COMMITTEE ON EDUCATIONAL POLICY**

### **Commission on the Extended University**

#### **Presentation By**

Fred E. Wood  
Executive Vice Chancellor  
Academic and Student Affairs

Sheila Thomas  
Assistant Vice Chancellor and Dean  
Professional and Continuing Education

#### **Summary**

This item proposes modifications in the policy document entitled "Provisions for the Commission on the Extended University in the California State University" issued pursuant to the Standing Orders of the Board of Trustees, Section II(n) and makes available to the campuses Board of Trustees Resolution REP 07-93-06 and policy document entitled: "Provisions for the Commission on the Extended University of the California State University" issued in 2002. There has been significant diversification in self-support activities since the policy was issued, and the commission is well positioned to advise the chancellor on these matters. Specifically, the recommended changes concern the title of the "Provisions," the title of the "Commission on the Extended University," the membership of this commission and editorial updates based on changes that have taken place in the system since 2002.

#### **Background**

At its meeting of July 13-14, 1993, the Board of Trustees adopted a revised policy document entitled "Provisions for Extended University in The California State University." The document provided for a change of name, change in membership and editorial changes based on updates since 1977.

Adoption of the "Provisions" reflected the ongoing commitment of the Board of Trustees to serve the needs of the growing number of individuals who desire access to higher education but who are not then able to take full advantage of the CSU's traditional programs. The provisions were intended to cover all academic and instructional programs designed and deployed to provide increased access, equity and utilization of the educational resources of the system. The document represented a broad mandate and included specific references to off-campus and online instruction, and flexible and accelerated formats.

There has been significant diversification and expansion of self-support programs to increase access to CSU resources for local, regional, state and international audiences. As a result, the Commission on the Extended University has reviewed its charge and recommends certain changes in the "Provisions" adopted by the board in 1993, and subsequent policy issued in 2002. The proposed changes (along with others of an editorial nature intended to make the document consistent with other changes that have taken place since 2002) are integrated into Attachment A to this agenda item.

### **Proposed Changes**

The proposed modifications, if adopted by the board, would:

- Change the name from “Commission on the Extended University” to “Commission on Professional and Continuing Education” to align with the recent name change from “Extended Education” to “Professional and Continuing Education” in the Division of Academic and Student Affairs.
- Clarify the membership to designate two existing positions as directors-at-large to allow more flexibility for subject matter expertise; designating Assistant Vice Chancellor/Dean and Commission Manager as ex-officio member; and clarifying Chancellor’s Office staff from the Division of Academic and Student Affairs.
- Update and clarify the charge and duties of the commission, with an emphasis on policies, procedures and student success strategies pertaining to PaCE programs and the improvement of access, equity, and greater utilization of the CSU educational resources of the system.

Concerning these changes recommended by the Commission on the Extended University, staff in the Office of the Chancellor have consulted with the campus deans of PaCE and systemwide representatives to the commission including academic senate, presidents, provosts, deans, and general members.

The following resolution is recommended for adoption:

**RESOLVED**, by the Board of Trustees of The California State University, that the changes contained in Attachment A to agenda item 2 of the July 13-14, 2021, meeting of the Trustees' Committee on Educational Policy entitled "Provisions for the Commission on the Extended University in the CSU " be approved.



## Attachment A

### I. Purpose

The Commission on the Extended University is ~~established~~ renamed the Commission on Professional and Continuing Education (CPaCE) and charged by the Board of Trustees to facilitate, promote, and encourage Extended Education self-support programs within the California State University (CSU). For the purposes of these provisions, the commission will focus on policies, procedures and student success strategies pertaining to PaCE programs and the improvement of access, equity and utilization of the educational resources CSU system.; ~~extended education programs include all instructional programs designed and utilized to provide increased access to the educational resources of the system and to otherwise facilitate utilization of these resources. Extended education embraces all self-support and state-supported (i.e., General Fund) instructional programs that serve the purposed specified above. Examples include off campus instruction, distance education, programs offered on irregular calendars or schedules, multi-campus and regional programs, international education, and other programs designed to serve students in both General Fund and self-support programs on and off campus. Extended Education programs are organized, administered, and offered by individual campuses and by cooperating campuses.~~

### II. Membership of the Commission on the ~~Extended University~~ Professional and Continuing Education (CPaCE)

The California State University Commission on ~~the Extended University~~ PaCE is composed of:

- A. Four full-time faculty members nominated by the Academic Senate, CSU
- B. Two provosts/vice-presidents for academic affairs.
- C. Three campus deans of PaCE.
- D. Three representatives of the Chancellor's Office Division of Academic and Student Affairs.
- E. Two directors-at-large. of international education and of distance education;
- F. Chancellor's Office Assistant Vice Chancellor/Dean of PaCE and PaCE Manager, ex-officio, and
- G. Two campus presidents, one of whom will serve as commission chair.

### III. Responsibilities of the Commission ~~on the Extended University~~

The Commission is charged with:

- A. Advising the chancellor on policies, procedures, and student success strategies pertaining to PaCE programs and the improvement of access, equity and utilization of the educational resources of the CSU system;
- B. Recommending to the chancellor policies and strategies governing the management of the Continuing Education Revenue Fund State University Trust Fund and Continuing Education/Extended Education PaCE (CE/EE) local trust funds; ~~including those activities that should receive support from the systemwide operations account within the systemwide Continuing Education while providing for the maintenance of a contingency reserve;~~
- C. Serving as a liaison between the campuses and the chancellor, as appropriate, on matters related to ~~Extended Education~~ PaCE programs;
- D. Reviewing and making recommendations to the chancellor concerning PaCE ~~Extended Education~~ programs, with a focus on student and workforce need and demand, including online learning and international education; ~~multi-campus and regional extended education programs;~~
- E. ~~Reviewing and making recommendations to the Chancellor concerning distance education, international education, and programs for off campus students;~~ Making recommendations on the level of cost recovery budgetary support for the PaCE department and the Commission (CPaCE) on the Extended University in the Office of the Chancellor; ~~and~~
- F. Reporting periodically to the chancellor on ~~Extended Education~~ PaCE activities; and
- G. Other advisory roles as may be requested by the chancellor.

## **COMMITTEE ON EDUCATIONAL POLICY**

### **Amendment to Title 5 Regulations: Credit for Prior Learning**

#### **Presentation By**

Fred E. Wood  
Executive Vice Chancellor  
Academic and Student Affairs

Alison M. Wrynn  
Associate Vice Chancellor  
Academic Programs, Innovations and Faculty Development

#### **Summary**

This information item proposes changes to the name and substance of Title 5 §40408. Currently titled *Credit Based on Examination*, the proposed title, *Credit for Prior Learning*, more accurately describes current practice in higher education as well as proposed revisions to existing policy. In addition to credit by examination, the proposed amendment seeks to expand the types of prior learning assessments from which credit may be earned to include portfolio assessment, interviews or other appropriate demonstrations of learning outcomes. Furthermore, proposed amendments would allow graduate, as well as undergraduate, students to earn credit for prior learning outside of traditional collegiate coursework. In sum, these amendments would update best practices for evaluating and awarding credit for prior learning and would support revisions to CSU Credit for Prior Learning policy. This item will be on the September agenda as an action item.

#### **Background**

Existing policy allows students to earn academic credit by passing a campus-authorized examination. In practice, eligible examinations may be developed by faculty or may be offered by an external entity such as College Level Examination Program (CLEP) or College Board/Advanced Placement (AP).

In addition to credit by examination, the proposed amendment seeks to expand the types of prior learning assessments from which credit may be earned to include portfolio assessment, interviews or other appropriate demonstrations of learning outcomes. Furthermore, eligibility for credit for prior learning is expanded to include graduate and as well as undergraduate students.

The proposed amendment supports recent revisions to existing CSU policy (EO 1036) in recognition of the multiple means by which students could earn collegiate credit for learning that

occurs outside of traditional settings. These revisions have been shared with faculty and administrators for input. Returning adult students and veterans are most likely to benefit from policies that facilitate credit for prior learning. The proposed change to Title 5 §40408 and the related CSU Credit for Prior Learning policy reflect best practice in support of more timely graduation and reduction of equity gaps.

**Proposed Revisions - §40408. Credit Based on Examination**

**Title 5. Education**  
**Division 5. Board of Trustees of the California State Universities**  
**Chapter 1. California State University**  
**Subchapter 2. Educational Program**  
**Article 5. General Requirements for Graduation**  
**5 CCR § 40408**

**§ 40408. Credit ~~Based on Examination~~ for Prior Learning.**

Unit credit toward the undergraduate or graduate degree may be secured by: (1) passing an examination given or approved by the appropriate campus authority in courses offered by the campus and for which credit has not otherwise been allowed, (2) demonstration of learning, skills and knowledge acquired through experience, (3) learning acquired outside formal higher education, (4) education and training provided by the Armed Forces of the United States or (5) other appropriate means of assessment as determined and approved by the appropriate campus authority in accordance with system policy.

Note: Authority cited: Sections 66600, 89030 and 89035, Education Code. Reference: Sections 66600 and 89030, Education Code.

An item will be presented at the September meeting for board action to adopt the recommended amendments to Title 5.

## **COMMITTEE ON EDUCATIONAL POLICY**

### **Recovery with Equity: A Roadmap for Higher Education After the Pandemic**

#### **Presentation By**

Fred E. Wood  
Executive Vice Chancellor  
Academic and Student Affairs

Lande Ajose  
Senior Policy Advisor for Higher Education  
Office of Governor Newsom

#### **Summary**

This informational item provides an overview of the “Recovery with Equity: A Roadmap for Higher Education After the Pandemic” report as presented by Dr. Lande Ajose. The complete report can be found as an attachment to this item.

#### **Background**

At the height of the COVID-19 pandemic, California’s higher education leaders convened a Recovery with Equity Taskforce — a groundbreaking effort that brought together state leaders, institutions, advocates, students and national thought leaders to chart a post-pandemic, equity-focused roadmap for higher education. The Taskforce was conceived of and chaired by Dr. Lande Ajose, Governor Gavin Newsom’s Senior Policy Advisor for Higher Education, and co-convened by the California Governor’s Council for Post-Secondary Education.

The Taskforce’s work was premised on the idea that higher education cannot afford to return to a pre-pandemic status quo — that instead, we must see the pandemic as an opportunity to move higher education toward a more equitable, accessible, and resilient future. After months of meetings and extensive stakeholder engagement, the Taskforce released its final report in February 2021.

The Taskforce produced 11 recommendations, divided across the following four guiding principles:

- 1) **Fostering Inclusive Institutions:** Institutional cultures and approaches to teaching and learning that work for all learners, especially those left behind.

- 2) Streamlining Pathways to Degrees: An integrated statewide system for admission and transfer to provide clear, easy-to-navigate pathways to degrees.
- 3) Facilitating Student Transitions: High-touch, high-tech guidance and improved academic preparation for college access and success.
- 4) Simplifying Supports for Student Stability: Resources and structures packaged and simplified to help students meet basic, digital and financial aid needs.



# RECOVERY WITH EQUITY

A ROADMAP FOR HIGHER EDUCATION AFTER THE PANDEMIC



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## Foreword by Dr. Lande Ajose

### CALIFORNIA FOR ALL CALLS US TO REACH HIGHER



Since the global pandemic struck, Californians, and the institutions that serve them, have been grappling with serious challenges—like how to manage grave health risks and ramifications, as well as frightening financial uncertainty. The national public health emergency that has wracked our economy has also revealed and intensified long-standing inequities across California, including deep disparities by region, age, race, and ethnicity in employment and in higher education.

Student success in higher education is critical to the health of our state and regional economies. But like most of California's economy, nearly every aspect of post-secondary teaching, learning, and campus life has been impacted by the global pandemic and recession. We need to ensure that California's systems of higher learning fully recover and thrive, and that while planning for this recovery, our students remain our number one priority. Their success is inextricably tied to the future of California.

Long before the pandemic, it was clear that too many California students face structural barriers that limit their opportunity to earn a college degree. Such barriers include the total cost of attending college, the time it takes to complete a degree program, and uneven access to college prerequisites. Historic inequities make these obstacles steeper for students who are Black, Latinx, Asian Pacific Islander, or Indigenous. The pandemic magnified stresses for students, leading some to stop out, drop out, and underperform, as mental health and other challenges became more acute. As a result, far too many are not realizing their goal of earning a degree, at the same time that California needs more college graduates to provide the workforce talent to meet future economic demands.

To fulfill the vision of California for All we can and must do better.

For this reason, together with the Governor's Council for Post-Secondary Education, I convened the Recovery with Equity Taskforce, a set of state and national experts in higher education and innovation, and asked its members to recast today's challenges as an opportunity to help California's economy recover with a post-secondary ecosystem that is more equitable, more resilient, and more coordinated.

Grounded in the conviction that equity in higher education is essential to a stronger California for All, the Taskforce set out to generate equity-driven, student-centered strategies, policies, and practices with a shared aim: to help California's post-secondary institutions emerge from the pandemic stronger and better poised to serve all students.

The Taskforce sought input from a broad swath of students and K–12 and post-secondary educators, as well as leaders in civic organizations, local governments, nonprofits, and workforce development. Many of the challenges they worked to address did not start with the pandemic, but the health crisis provided the opportunity to re-envision what's possible, and address new urgent issues of concern and those that have needed attention for a long time. This report seeks to address not only the realities students and institutions will face on the other side of the pandemic, but also what it will take to re-engage those students who have sidelined their academic and career ambitions amid extraordinary stress.

The Taskforce identified recommendations to advance four guiding principles:

- **Fostering Inclusive Institutions:** Institutional cultures and approaches to teaching and learning that work for all learners, especially those left behind.
- **Streamlining Pathways to Degrees:** An integrated statewide system for admission and transfer to provide clear, easy-to-navigate pathways to degrees.
- **Facilitating Student Transitions:** High-touch, high-tech guidance and improved academic preparation for college access and success.
- **Simplifying Supports for Student Stability:** Resources and structures packaged and simplified to help students meet basic, digital, and financial aid needs.

The recommendations supporting each of these principles are interconnected and together provide a roadmap for California's education systems, policymakers, business leaders, and philanthropic institutions as they plan for the short- and long-term economic needs of our state.

These approaches are intended to elevate the number and diversity of Californians who earn a degree, with a focus on improving outcomes for Black, Latinx, Asian Pacific Islander, Indigenous, and adult learner students who disproportionately have been denied opportunity and access to higher education. Doing so is essential to our commitment to equity that will strengthen California communities and the economy for generations to come.

The content of this report should be considered in context: Seven other recently published reports and an eighth, which is forthcoming, recommend steps to rebuild California's economy, strengthen critical economic sectors, and improve how we nurture and educate learners of all ages (see page 87 for a list of these reports). A common throughline of this body of work is the role of colleges and universities in driving recovery and prosperity. Woven together, these reports inspire a tapestry of reforms that will make California stronger across all regions and economic sectors. California also benefits from a new era of partnership with a federal administration that is aligned in its commitment to build back better with equity at the core of its agenda.

While the roadmap presented here by the Recovery with Equity Taskforce is bold and far-reaching, it is important to note that it does not address every critical issue that California students face. Unpacking and addressing college affordability and broader issues related to public higher education finance, for example, are largely outside the scope of this report. These topics remain an important area for additional reform.

Nor is this roadmap a to-do list for one leader or one institution. Rather, it is a call to our higher education segments and institutions to take strong action that will require coordination and collaboration across segments and within each region of our state. Post-secondary system leaders have an important implementation role, with progress on many fronts requiring collaboration with California's students, faculty, K-12 system, political leaders, the business community, and philanthropy. The imperative to recover from crisis provides a critical opportunity to act upon these recommendations to rebuild a more equitable higher education system that benefits all Californians.

I sincerely thank the esteemed state and national experts in higher education and innovation who served on the Recovery with Equity Taskforce over the past six months. I am grateful to the many students and leaders who shared their perspectives and suggestions to enrich the quality of this report and its recommendations—I am motivated and inspired by your insights. I thank Education First for supporting the Taskforce in research, exploration of solutions, report writing, and project management. I also extend my deep gratitude to College Futures Foundation for its support of the Taskforce and the production of this report.

During the presidential inauguration earlier this year, National Youth Poet Laureate Amanda Gorman urged Americans toward a better future in her poem “The Hill We Climb,” saying: **“We will not march back to what was, but move to what shall be.”** In this spirit our state will move toward our moonshot goal of eliminating equity gaps and charting a new trajectory toward a California for ALL.

*Dr. Lande Ajose is the senior policy advisor for higher education for the Office of Governor Gavin Newsom. She leads the Governor’s Council for Post-Secondary Education and chairs the Recovery with Equity Taskforce.*



# Taskforce Members

The California Higher Education Recovery with Equity Taskforce was convened to envision a new approach for California's post-secondary preparation and workforce readiness. It was established in August 2020 by Governor Gavin Newsom's Senior Policy Advisor for Higher Education, Dr. Lande Ajose, in consultation with the Governor's Council for Post-Secondary Education. The Recovery with Equity Taskforce comprised California and national experts in higher education equity and innovation and was chaired by Dr. Ajose.

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## **G. Gabrielle Starr**

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## **Michael Wiafe**

Former President  
California State University Student Association



# Vision for the Future of California's Post-Secondary System and Workforce

California has long been known for its strong and innovative economy, demographic diversity, and enviable quality of life. The state's rich and diverse environment—from mountains to deserts to farmland to beaches—makes it one of the most popular places to live. But the true value of California lies in its people.

**California succeeds when it builds fully on the talents, creativity, and energy of its people.** Many have contributed to and benefited from what the Golden State has to offer, but there is work to do to ensure that the opportunity for success and economic mobility is equitable and available to all.

The global coronavirus pandemic has had devastating health and economic consequences for the people of California. It has exacerbated existing employment and wealth gaps, food and housing insecurity, and inequality of digital access. All of this change has occurred in the midst of our nation's reckoning over systemic racism.

**It is critical to chart a course to a new day when all Californians can actively participate in helping our state thrive.** What is the best route to that future? Preparing everyone with the training and education necessary to engage in the high-quality, in-demand jobs that will drive a recovering, vital economy.

**The current rate of educational attainment in California is insufficient to meet workforce needs.** Most of the fastest-growing high-quality jobs in the state require post-secondary education, and there are significant gaps in educational attainment by race/ethnicity and geographic region.<sup>1</sup> Low-income, first-generation, Latinx, Black, and Indigenous students—who make up most of the student population in California's public high schools—are less likely than their peers to finish high school, complete the A–G coursework necessary for admission to the University of California (UC) and California State University (CSU), enroll in college, and graduate from college.<sup>2</sup> Coastal regions far exceed inland regions in percentage of residents with post-secondary degrees; this trend mirrors economic disparities between the coastal and inland regions.

California has the **fifth highest unemployment** in the nation.<sup>20</sup>

San Joaquin Valley and Imperial Valley experience **depression-level unemployment, at 29% and 27% respectively.**<sup>20</sup>

Black and Latinx residents face disproportionately **high unemployment rates, at 8.2% and 7.9% in 2020,** compared to 7.0% total unemployment that year.<sup>8</sup>

**99% of the Black labor force** with a high school degree or less **filed for unemployment in 2020.**<sup>10</sup>

The pandemic has exacerbated these problems. Many Californians are choosing between feeding their families and incurring the real costs of pursuing degrees that could change their futures for the better. While virtual instruction presents an opportunity to significantly expand capacity, it also presents an array of challenges, including access to necessary technology, quality of online teaching, and lack of necessary personal and academic support. In addition, out-of-work adults often have trouble finding post-secondary programs with the kind of intensive, just-in-time approach and support they need to quickly retrain for different industries and get back on their feet. With families sheltering at home, students of all ages learning virtually, and many out of work or underemployed, participating in post-secondary education is an increasingly difficult choice to make.

The result? Many Californians are choosing not to re-enroll in programs they have already begun or not to enter post-secondary education at all. Fall 2020 post-secondary enrollment dropped by 6.1% in California compared with fall 2019, far worse than the national one-year enrollment decline of 2.5%.<sup>3</sup> The drop in enrollment was most severe at California's community colleges, where the majority of Black and Latinx post-secondary students are concentrated.

All learners have been affected, but this report focuses on those most severely impacted: Black, Latinx, Asian Pacific Islander, and Indigenous Californians, as well as adults without post-secondary credentials or those who need to return to post-secondary learning to upskill or re-skill for a different job or industry. What was an existing challenge pre-pandemic is now an undeniable and widening racial attainment gap that demands action.

**All learners have been affected, but this report focuses on those most severely impacted: Black, Latinx, Asian Pacific Islander, and Indigenous Californians, as well as adults without post-secondary credentials or those who need to return to post-secondary learning to upskill or re-skill for a different job or industry.**

How do we turn this around? How do we upskill, re-skill, and re-engage displaced workers in the short term? How can we close equity gaps and promote success for students of color and adult learners? What will it take to develop the talent that will drive the state's recovery and diversify the workforce at all levels? The California Recovery with Equity Taskforce wrestled with these important questions.

**The Taskforce believes California needs a recovery that courageously addresses inequities in post-secondary education that have created and exacerbated wealth gaps.**

***California will thrive when income inequality and disparities of credential and degree attainment by race and geography are eliminated.***

The Taskforce's recommendations focus on redesigning post-secondary education with equity at its core to bring this vision to life by:

- **Listening carefully to the voices and expectations** of Black, Latinx, Indigenous, Asian Pacific Islander, and adult learners—those student groups experiencing the widest equity gaps today—in determining priorities for redesign of the post-secondary system
- **Dramatically increasing the number and diversity of learners** who earn post-secondary degrees and other credentials
- **Eliminating attainment gaps, with equitable outcomes** for all students regardless of historic distinctions by race and ethnicity, gender, geography, age, immigration status, or economic status
- **Preparing an increasingly diverse population for jobs** critical to the state's economic recovery and future with credentials and degrees in areas such as STEM (science, technology, engineering, and math), healthcare, and education<sup>4</sup>
- **Harnessing the power of California's political and civic leadership**, K–12 education system, business community, and philanthropic institutions to support student success and drive economic mobility in the growing sectors of the state's economy

**As California seeks to recover from the pandemic, it is not enough to go back to the way things were. Californians must learn from this experience, build on their assets, and reimagine the future.** Recovery with Equity will take the efforts of Californians across disciplines: from post-secondary institutions to K–12 schools, from human services agencies to local healthcare providers, from business partners to learner-focused nonprofit organizations. Working together, Californians can change the trajectory of the state so that all its residents have the support they need to qualify for the high-wage, high-quality, high-demand jobs that will drive California's economy. The potential in California is limited only by the talent and skills of its people.

The work ahead is challenging. But the post-secondary sector, in partnership with communities across the state, can build a more equitable future from this crisis. Together, Californians can make that future a reality.

## Taskforce Context

The Recovery with Equity Taskforce was convened to envision a new approach for post-secondary preparation and workforce readiness in California. It was established in August 2020 by Governor Gavin Newsom's Senior Policy Advisor for Higher Education, Dr. Lande Ajose, in consultation with the Governor's Council for Post-Secondary Education. The Recovery with Equity Taskforce comprised California and national experts in higher education equity and innovation and was chaired by Dr. Ajose (see page 6 for a list of Taskforce members).

The Taskforce worked collaboratively to produce a roadmap for California's public post-secondary institutions to recover from the impact of the pandemic more integrated, equitable, and resilient than before—and more aligned with the economic needs of the state. The Taskforce invites and encourages California's independent post-secondary institutions to participate in this agenda as well.

The Taskforce followed an equity-centered process in developing its recommendations. It regularly acknowledged and reflected on race, identity, historical/political context, and power, and rigorously engaged stakeholders most proximate to California's pressing equity issues. Interviews, focus groups, and feedback tools captured the experiences and ideas of 105 leaders and stakeholders from K–12 and higher education, local government, nonprofit organizations, and workforce development agencies (see page 78 for a list of these stakeholders). Most important, this research captured the perspectives of 91 diverse college and high school students from five California regions: the Bay Area, San Joaquin Valley, Inland Empire, Los Angeles, and Imperial Valley.

Following the publication of the Taskforce's report, the Governor's Council for Post-Secondary Education will lead next steps in implementation and engagement.



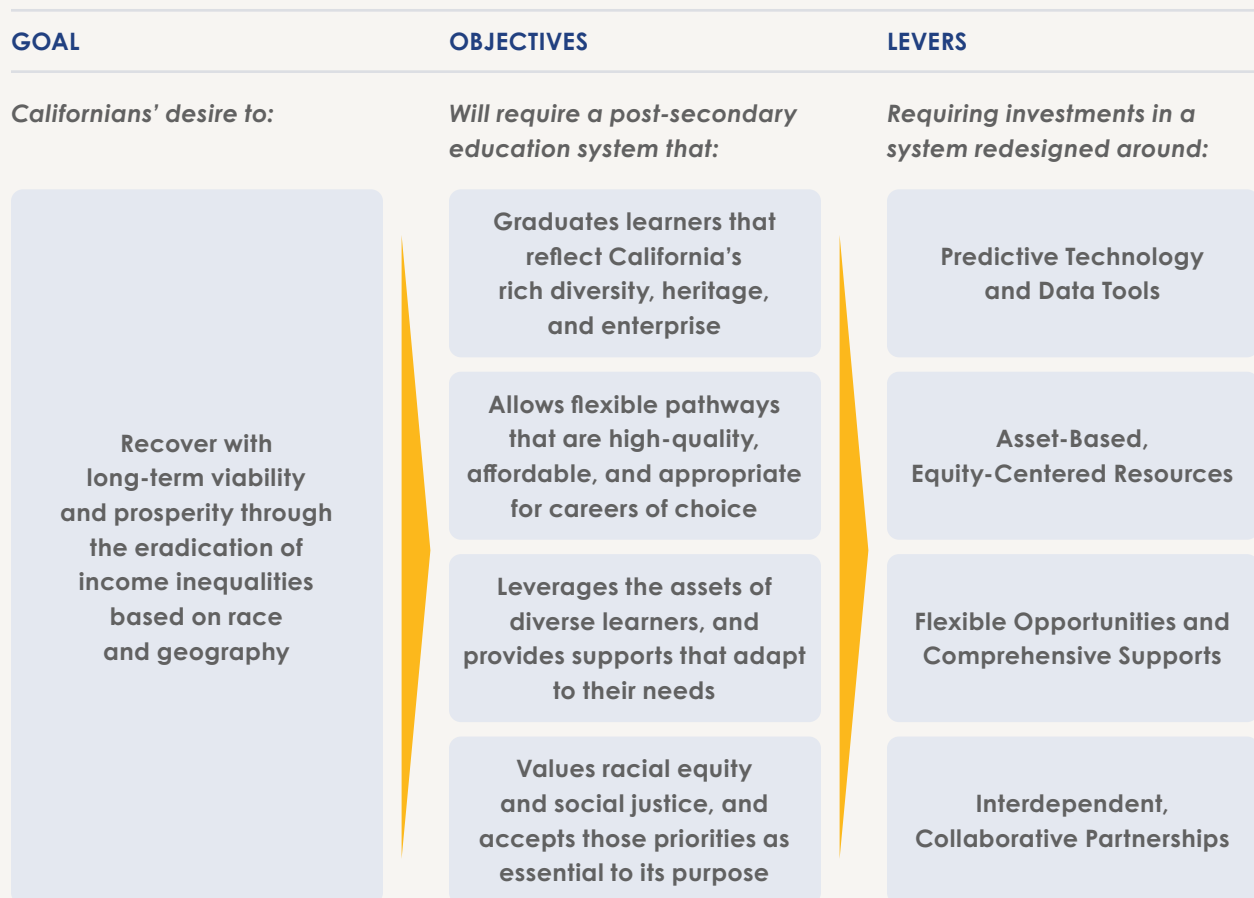


# Recovery Framework

The Taskforce conducted its work with a keen understanding that its task could be accomplished only through far-reaching, deeply embedded system redesign.

Historically, California's higher education system was designed based on implicit assumptions about its student population that do not reflect the richly diverse learners it now serves. While improvements have been made to the higher education system throughout the years, the Taskforce recognized that significant change is still required to realize the system's potential to drive equitable opportunity and economic mobility. The Taskforce's approach resulted in a Recovery Framework (see Figure 1 below) that articulates its vision for a better future for all Californians, redesigns key elements of the system for post-secondary education, and describes the investments required.

**FIGURE 1: RECOVERY FRAMEWORK**



The Recovery Framework illustrates the logic that informed the Taskforce's final recommendations and features a set of four key change levers:

### **Predictive Technology and Data Tools**

Easy-to-use, automated technology that provides personalized access, navigation, and support for learners along their post-secondary journeys. The tools should be anchored by California's new Cradle-to-Career Data System so that it is integrated across segments and designed with predictive analytics, as well as data-sharing across systems and institutions, to provide learners with timely, coherent, and comprehensive advising, interventions, and resources.

### **Asset-Based, Equity-Centered Resources**

Tools, guidance, training, and resources to embed equity-focused culture and commitment at every level of the post-secondary system. Investments should be rooted in instructional environments that are engaging and cultivate a sense of belonging, and in institutional supports that build upon learners' strengths and meet their unique needs and career interests. To be effective, these resources must be embedded within each segment's internal processes.

### **Flexible Opportunities and Comprehensive Supports**

Reimagined instructional and resource offerings catered to the "whole learner" and the diversity of their talents, life circumstances, and career pursuits. System structures, processes, and financial supports should be re-engineered to eliminate barriers by embracing flexible educational pathways and innovative student assistance.

### **Interdependent, Collaborative Partnerships**

Investment of time and incentives in new and promising ways of working within and across institutions and systems that are learner-centered and equity-driven. Authentic relationships and partnerships can be established by prioritizing the interdependencies that are critical for learner success, and using those interdependencies as the blueprint for regional and statewide coherence.

## Summary of Taskforce Recommendations

Just as the challenges in recovering with equity are complex—and not caused by one factor alone—it is also true that one recommendation alone will not propel Californians in their recovery. The recommendations in this report are a set of interconnected and interdependent systemic solutions meant to fundamentally change the way California supports all learners. California's institutions and systems of education are dedicated to serving students, but must fundamentally shift to a learner-centered perspective that is proactive and prioritizes the supports and structures that will help all learners thrive. To do this work, higher education must collaborate within and across segments and with key partners, including K–12 education, nonprofit organizations, and employers. Independent institutions, which are an integral part of California's higher education system, are invited to join these efforts and to adopt or adapt these recommendations to meet the needs of their student populations.

The Taskforce identified recommendations to advance four guiding principles:



### Fostering Inclusive Institutions

Institutional cultures and approaches to teaching and learning that work for all learners, especially those left behind.



### Streamlining Pathways to Degrees

An integrated statewide system for admission and transfer to provide clear, easy-to-navigate pathways to degrees.



### Facilitating Student Transitions

High-touch, high-tech guidance and improved academic preparation for college access and success.



### Simplifying Supports for Student Stability

Resources and structures packaged and simplified to help students meet basic, digital, and financial aid needs.



## Fostering Inclusive Institutions

**Goal:** By 2030, learners of all backgrounds will report that they feel valued, supported, and affirmed at their institutions; that faculty are adept at creating courses that are responsive to and build upon the unique experiences, needs, and talents of all learners; and that post-secondary institutions actively support their academic success and career readiness.

### 1. Improve Faculty, Staff, and Administrator Diversity

An equitable and inclusive culture cannot occur if campus personnel do not reflect the rich diversity of California. Expanding faculty, staff, and administrator diversity requires dedicated, intentional efforts bolstered by strong data monitoring and accountability.

### 2. Cultivate Inclusive, Engaging, and Equity-Oriented Learning Environments

System and local boards, faculty, administrators, and staff need professional development, resources, and support to redesign the learning environment so that it better serves all learners.

### 3. Retain Students through Inclusive Supports

To develop an affirming and supportive culture that promotes student wellbeing and academic success, institutions must intentionally, thoughtfully, and creatively evaluate and, as necessary, redesign current support activities and develop new practices and programs.



## Streamlining Pathways to Degrees

**Goal:** By 2030, learners will have clear, easy-to-navigate pathways into and through post-secondary education, as well as admission and transfer processes facilitated by an integrated technology platform, dual admission, and common course numbering.

### 4. Establish an Integrated Admissions Platform

California should create a single technology platform for admissions and transfer to replace the currently overwhelming and byzantine application and transfer processes. Designed well, such a platform also can help colleges and universities better manage enrollment, integrate recognition of students' existing knowledge and skills through credit for prior learning and mastery-based learning, plan for course delivery, and address capacity constraints.

## 5. Streamline and Unify the College Admission Process

Recognizing that most learners attend more than one college in order to earn a degree, California public institutions should adopt a streamlined and unified admission process, enabled by an integrated technology platform, that provides an option for dual admission to smooth the pathway for learners who wish to attend a four-year institution but begin at a community college.

## 6. Develop a Common Course Numbering System

To streamline transfer from two- to four-year institutions and reduce excess credit accumulation, California's community colleges should adopt a common course numbering system, starting with general education requirements, and eventually expanding to transfer pathway courses. The aim would be to align all community college courses so that students transferring to four-year institutions know, as they are pursuing their courses, that they are meeting the requirements of the receiving institutions.



## Facilitating Student Transitions

**Goal:** By 2030, learners in all public schools will have access to college preparatory coursework; early college experiences; and a high-tech, high-touch advising system that supports their success from middle and high school into and through higher education and into the workforce.

## 7. Provide High-Tech, High-Touch Advising

Through an integrated technology platform paired with a statewide chatbot, California can ensure that middle school, high school, and college learners (and those who support them) can access all the information they need regarding learners' educational records, college preparation, enrollment, financial aid, and progress toward a degree. The technology platform and chatbot should integrate tools to allow advisors to provide data-driven, high-tech, high-touch advising to support learners on their pathways to degrees.

## 8. Support College Preparation and Early Credit

Completing a college preparatory curriculum is important to high school learners' ability to transition and succeed in post-secondary education. A–G course completion sets learners up to be eligible for admission to CSU and UC, and earning early college credit—for example, through dual enrollment—not only gives learners credit toward a post-secondary degree but also can instill confidence in their ability to be successful in college. K–12 and post-secondary education should work together to make A–G coursework the default high school curriculum, strengthen K–12 accountability for college preparation, and expand access to early college experiences.



## Simplifying Supports for Student Stability

**Goal:** By 2030, learners will receive support to meet basic needs through a simplified, integrated system that enables qualified college students to access California's social services, subsidized internet and technology, and increased financial aid.

### 9. Integrate Platform of State Services for Students

California should build an integrated platform that allows learners to apply all at once for the full spectrum of state services they qualify to receive (e.g., financial aid, CalFresh, housing programs, health/mental healthcare, subsidized childcare, transportation, internet/technology support, etc.). The system also would provide all students, families, and advisors with a simplified, low-burden approach to completing the FAFSA and the California Dream Act Application (CADAA) prior to high school graduation and return timely information to support their next steps. When combined with a unified college application process, this system can become a powerful one-stop shop for post-secondary learners, families, and advisors.

### 10. Subsidize Internet Access for Eligible Students

California should provide students who need it with subsidized access to reliable internet service by expanding the amount of funds offered through Cal Grant B and forming public-private partnerships to offer support for internet and technology access to all students who qualify. This strategy builds on the significant effort begun early in the pandemic to expand technology access, and on recommendations of the *California Broadband for All*<sup>5</sup> report issued in late 2020.

### 11. Improve College Affordability

California would benefit from increasing and diversifying opportunities for financial aid, as well as providing students with paid work opportunities (including federal work study) that prepare them for careers without getting in the way of their academic progress. Finally, California must create a pathway whereby learners can complete post-secondary education without having to take on additional debt, through a combination of refocusing and increasing student financial aid.



# Introduction

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**California has long been known for its strong and innovative economy, demographic diversity, and enviable quality of life. The state's rich and diverse environment—from mountains to deserts to farmland to beaches—makes it one of the most popular places to live. But the true value of California lies in its people.**

**California succeeds when it builds fully on the talents, creativity, and energy of its people.** Many have contributed to and benefited from what the Golden State has to offer, but there is work to do to ensure that the opportunity for success and economic mobility is equitable and available to all.

The global coronavirus pandemic has had devastating health and economic consequences for the people of California. It also has exacerbated existing employment and wealth gaps, food and housing insecurity, and inequality of digital access. All of this change has occurred in the midst of our nation's reckoning over systemic racism.

**It is critical to chart a course to a new day when all Californians can actively participate in helping our state thrive.** What is the best route to that future? Preparing everyone with the training and education necessary to engage in the high-quality, in-demand jobs that will drive a recovering, vital economy.

**The current rate of educational attainment in California is insufficient to meet workforce needs.** Most of the fastest-growing high-quality jobs in the state require post-secondary education, and there are significant gaps in educational attainment by race/ethnicity and geographic region.<sup>6</sup> Low-income, first-generation, Latinx, Black, and Indigenous students—who make up most of the student population in California's public high schools—are less likely than their peers to finish high school, complete the A–G coursework necessary for admission to the University of California (UC) and California State University (CSU), enroll in college, and graduate from college.<sup>7</sup>

As the Recovery with Equity Taskforce began its work in the summer of 2020, California had the fifth highest unemployment rate in the nation, with Black and Latinx residents and residents of inland and rural communities experiencing the highest rates of all.<sup>9</sup> Many who have experienced unemployment or underemployment during the pandemic are in industries unable to move to remote work (such as tourism and hospitality) and do not possess the credentials needed to access jobs in other growing and in-demand occupations. More than half of California's labor force with a high school degree or less (who account for 38% of all workers in the state) has filed for unemployment since March 2020 compared with 13% of the labor force with a bachelor's degree or higher. Virtually all of the Black labor force with a high school degree or less (99%) has filed for unemployment, along with 75% of the Asian Pacific Islander labor force with this level of education, compared with 52% of the white labor force and 33% of the Latinx labor force that did the same.<sup>10</sup> Coastal regions far exceed inland regions in percentage of residents with post-secondary degrees; this trend mirrors economic disparities between the coastal and inland regions.

Many Californians are choosing between feeding their families and incurring the real costs of pursuing degrees that could change their futures for the better. While virtual instruction presents an opportunity to significantly expand capacity, it also presents an array of challenges, including access to necessary technology, quality of online teaching, and lack of necessary personal and academic support. In addition, out-of-work adults often have trouble finding post-secondary programs with the kind of intensive, just-in-time approach and support they need to quickly retrain for different industries and get back on their feet. With families sheltering at home, students of all ages learning virtually, and many out of work or underemployed, participating in post-secondary education is an increasingly difficult choice to make.

California has the **fifth highest unemployment** in the nation.<sup>20</sup>

San Joaquin Valley and Imperial Valley experience **depression-level unemployment, at 29% and 27% respectively.**<sup>20</sup>

Black and Latinx residents face disproportionately **high unemployment rates, at 8.2% and 7.9% in 2020,** compared to 7.0% total unemployment that year.<sup>8</sup>

**99% of the Black labor force** with a high school degree or less **filed for unemployment in 2020.**<sup>10</sup>



The result? Many Californians are choosing not to re-enroll in programs they have already begun or not to enter post-secondary education at all. Fall 2020 post-secondary enrollment dropped by 6.1% in California compared with fall 2019, far worse than the national one-year enrollment decline of 2.5%.<sup>11</sup> The drop in enrollment was most severe at California's community colleges, where the majority of Black and Latinx post-secondary students are concentrated.

All learners have been affected by the pandemic, but this report focuses on those most severely impacted: Black, Latinx, Asian Pacific Islander, and Indigenous Californians, as well as adults without post-secondary credentials or those who need to return to post-secondary learning to upskill or re-skill for a different job or industry. What was an existing challenge pre-pandemic is now an undeniable and widening racial attainment gap that demands action.

How do we turn this around? How do we upskill, re-skill, and re-engage displaced workers in the short term? How can we close equity gaps and promote success for students of color and adult learners? What will it take to develop the talent that will drive the state's recovery and diversify the workforce at all levels? The California Recovery with Equity Taskforce wrestled with these important questions.

**The Taskforce believes California needs a recovery that courageously addresses inequities in post-secondary education that have created and exacerbated wealth gaps.**

***California will thrive when income inequality and disparities of credential and degree attainment by race and geography are eliminated.***

The Taskforce's recommendations focus on redesigning post-secondary education with equity at its core to bring this vision to life by:

- **Listening carefully to the voices and expectations** of Black, Latinx, Indigenous, Asian Pacific Islander, and adult learners—those student groups experiencing the widest equity gaps today—in determining priorities for redesign of the post-secondary system
- **Dramatically increasing the number and diversity of learners** who earn post-secondary degrees and other credentials
- **Eliminating attainment gaps, with equitable outcomes** for all students regardless of historic distinctions by race and ethnicity, gender, geography, age, immigration status, or economic status
- **Preparing an increasingly diverse population for jobs** critical to the state's economic recovery and future with credentials and degrees in areas such as STEM (science, technology, engineering, and math), healthcare, and education<sup>12</sup>
- **Harnessing the power of California's political and civic leadership**, K-12 education system, business community, and philanthropic institutions to support student success and drive economic mobility in the growing sectors of the state's economy

**As California seeks to recover from the pandemic, it is not enough to go back to the way things were. Californians must learn from this experience, build on their assets, and reimagine the future.** Recovery with Equity will take the efforts of Californians across disciplines: from post-secondary institutions to K-12 schools, from human services agencies to local healthcare providers, from business partners to learner-focused nonprofit organizations. Working together, Californians can change the trajectory of the state so that all its residents have the support they need to qualify for the high-wage, high-quality, high-demand jobs that will drive California's economy. The potential in California is limited only by the talent and skills of its people.

The work ahead is challenging. But the post-secondary sector, in partnership with communities across the state, can build a more equitable future from this crisis. Together, Californians can make that future a reality.

# The Recovery with Equity Taskforce

The Recovery with Equity Taskforce was convened to envision a new approach to post-secondary preparation and workforce readiness in California. It was established in August 2020 by Governor Newsom's Senior Policy Advisor for Higher Education, Dr. Lande Ajose, in consultation with the Governor's Council for Post-Secondary Education. The Recovery with Equity Taskforce comprised an intentionally diverse team of California and national experts in higher education equity and innovation and was chaired by Dr. Ajose (see page 6 for a list of Taskforce members).

The Taskforce worked collaboratively to produce a roadmap for California's public post-secondary institutions to recover from the impact of the pandemic more integrated, equitable, and resilient than before—and more aligned with the economic needs of the state. The Taskforce invites and encourages California's independent post-secondary institutions to participate in this agenda as well.

This Taskforce's recommendations acknowledge and build on numerous initiatives already underway to address some barriers and inequities. Examples of existing initiatives include:

- *California Community Colleges*: Vision for Success, placement reforms and elimination of remedial courses, the California College Promise, and Associate Degree for Transfer<sup>13</sup>
- *Career Technical Education*: K12 Strong Workforce Program, Career Technical Education Incentive Grant, California Career Pathways Trust<sup>14</sup>
- *California State University*: Graduation Initiative 2025, policy changes to general education and remedial education in 2017<sup>15</sup>
- *University of California*: UC 2030, 2018 Enhancing Student Transfer agreement<sup>16</sup>
- California Student Aid Commission's Cal Grant Modernization Project<sup>17</sup>
- California Cradle-to-Career Data System<sup>18</sup>
- California College Guidance Initiative<sup>19</sup>

Each month from August 2020 to January 2021, Taskforce members convened virtually to identify and discuss the most pressing equity issues in California's post-secondary education system and develop recommendations for change using equity-centered design methods. Throughout the process, the Taskforce was driven by questions all states should be asking themselves:

*Are people from all demographic groups and geographic regions earning the credentials and degrees that will help them—and our state economy—thrive? Are our post-secondary institutions and systems equitably supporting not just student learning and academics, but students' ability to access economic and social mobility? If not, what is in the way? Which students are succeeding and who is being left out? What are students telling us about their aspirations, challenges, experiences, and needs as they look to earn degrees? What will it really take for post-secondary education in California to seize this moment of change and use it to recover from the pandemic fundamentally more equitable and resilient than it was before?*

The Taskforce followed an intentional process to ensure that equity remained its highest priority every step of the way.

- **Vision-setting:** The Taskforce began its work by discussing a vision of recovery for post-secondary education in California and establishing a set of equity commitments for each phase of the Taskforce process (see page 86 for the Taskforce Equity Framework).
- **Research and stakeholder engagement:** Next, the Taskforce reviewed and discussed quantitative and qualitative research<sup>20</sup> on post-secondary education and workforce outcomes in California, as well as the needs and experiences of priority stakeholders throughout the state. Interviews and focus groups were conducted with 105 leaders and stakeholders from K–12 and higher education, local government, nonprofit organizations, and workforce development (see page 78 for a list of stakeholder participants). In addition, focus groups were conducted with 91 diverse college and high school students from five California regions: the Bay Area, San Joaquin Valley, Inland Empire, Los Angeles, and Imperial Valley. With this data in hand, the Taskforce was able to hone in on the most important issues in the state's post-secondary education system, with a clear understanding that Black, Latinx, Indigenous, Asian Pacific Islander, and adult students needed to be at the center of its recommendations.
- **Solution development:** Once critical equity issues had been identified, the Taskforce organized into small working groups with some of the state's leading post-secondary and workforce experts to brainstorm and develop solutions to address those issues. The working groups' solution ideas were then shared with the same stakeholders who had participated in the initial interviews and focus groups to get their thoughts and feedback to help shape the Taskforce's final recommendations (see page 77 for a list of working group members).
- **Recommendations and dissemination:** Taskforce members then continued to meet and work together to refine solution ideas into a final set of guiding principles, each with a problem statement, goal, and set of specific, actionable recommendations to achieve that goal.

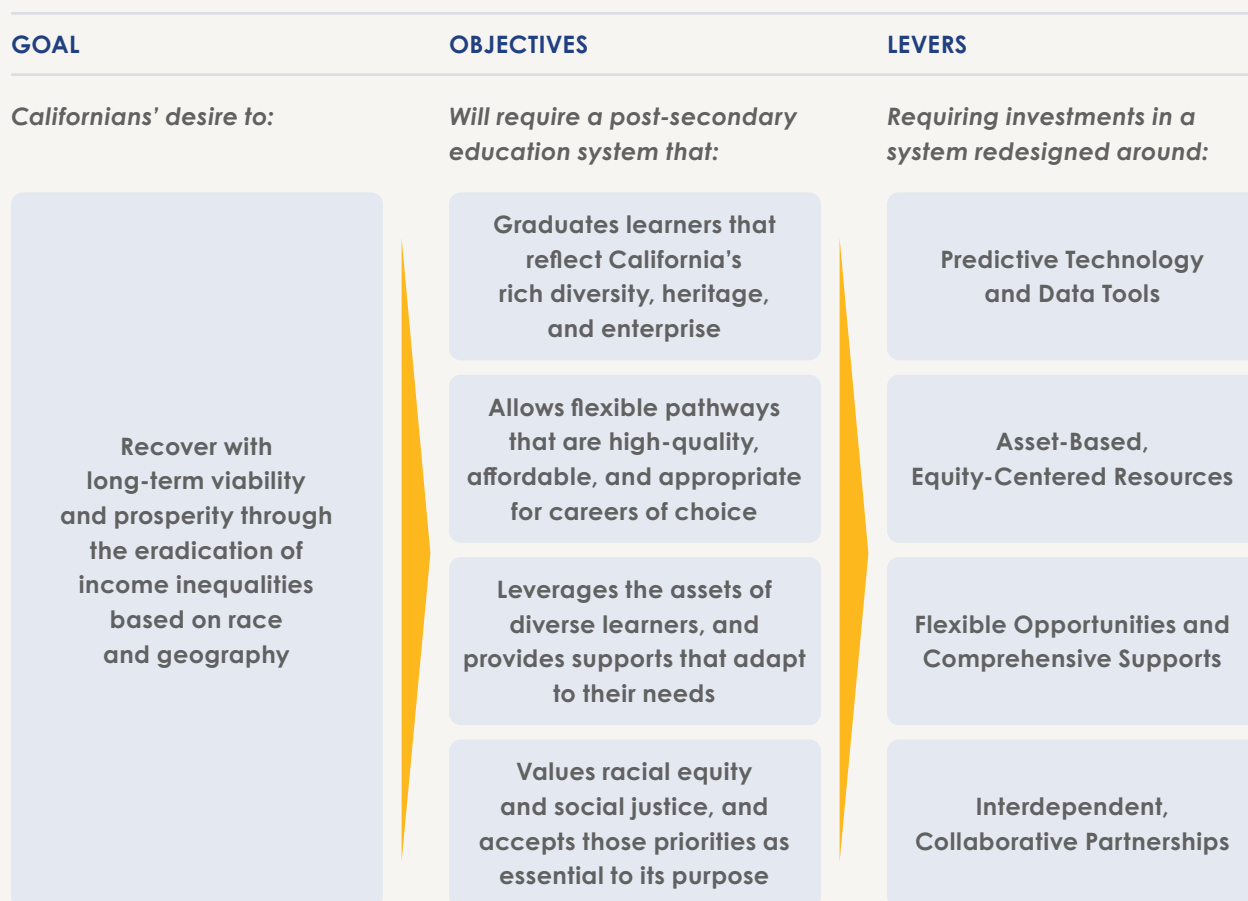
Throughout this process, the Taskforce followed an equity-centered approach, reflecting on race, identity, power, and historical/political context in its work, and rigorously engaging people most proximate to the state's pressing equity issues through interviews, focus groups, and feedback tools.

# Recovery Framework

The Taskforce conducted its work with a keen understanding that its task could be accomplished only through far-reaching, deeply embedded system redesign.

Historically, California's higher education system was designed based on implicit assumptions about its student population that do not reflect the richly diverse learners it now serves. While improvements have been made to the higher education system throughout the years, the Taskforce recognized that significant change is still required to realize the system's potential to drive equitable opportunity and economic mobility. The Taskforce's approach resulted in a Recovery Framework (see Figure 1 below) that articulates its vision for a better future for all Californians, redesigns key elements of the system for post-secondary education, and describes the investments required.

**FIGURE 1: RECOVERY FRAMEWORK**



The Recovery Framework illustrates the logic that informed the Taskforce's final recommendations and features a set of four key change levers:

**Predictive Technology  
and Data Tools**

Easy-to-use, automated technology that provides personalized access, navigation, and support for learners along their post-secondary journeys. The tools should be anchored by California's new Cradle-to-Career Data System so that it is integrated across segments and designed with predictive analytics, as well as data-sharing across systems and institutions, to provide learners with timely, coherent, and comprehensive advising, interventions, and resources.

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**Asset-Based,  
Equity-Centered Resources**

Tools, guidance, training, and resources to embed equity-focused culture and commitment at every level of the post-secondary system. Investments should be rooted in instructional environments that are engaging and cultivate a sense of belonging, and in institutional supports that build upon learners' strengths and meet their unique needs and career interests. To be effective, these resources must be embedded within each segment's internal processes.

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**Flexible Opportunities and  
Comprehensive Supports**

Reimagined instructional and resource offerings catered to the "whole learner" and the diversity of their talents, life circumstances, and career pursuits. System structures, processes, and financial supports should be re-engineered to eliminate barriers by embracing flexible educational pathways and innovative student assistance.

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**Interdependent,  
Collaborative Partnerships**

Investment of time and incentives in new and promising ways of working within and across institutions and systems that are learner-centered and equity-driven. Authentic relationships and partnerships can be established by prioritizing the interdependencies that are critical for learner success, and using those interdependencies as the blueprint for regional and statewide coherence.

# Key Research Findings

The Taskforce's deliberations were informed by extensive research on post-secondary and workforce outcomes and experiences in California. Research activities included review of key findings from existing reports, original analyses of publicly available data, and interviews and focus groups with 196 stakeholders across California.

## FINDINGS FROM REPORTS AND DATA ANALYSIS

In California, a bachelor's degree yields higher wages, increased full-time employment, and lower unemployment. Those with a bachelor's degree are more likely to own a home, less likely to live in poverty, and more likely to be civically engaged. Demand for workers with post-secondary credentials is increasing in the vast majority of industries, including those that traditionally have not required post-secondary credentials.<sup>21</sup>

Academic and occupational sub-baccalaureate degrees and credentials are also an important part of California's higher education system. One in three jobs in California requires some college but less than a bachelor's degree. Those with career education credentials see an average 20% increase in earnings and, while they still earn less than those with a bachelor's degree, this increase in earnings can be substantial for many Californians.<sup>22</sup>

Educational attainment in California is insufficient to meet the current and anticipated demand for high-skill workers.<sup>23</sup> Only 42% of residents aged 25 or older hold an associate's degree or higher, and only 34% hold a bachelor's degree or higher (slightly above the national rate of 32%).<sup>24</sup> When non-degree workforce credentials are added into these calculations, California is estimated to have 51% post-secondary attainment among its adult population.<sup>25</sup>

**Educational attainment in California is insufficient to meet the current and anticipated demand for high-skill workers.**

Further, Californians have inequitable access and support on the pathway to and through post-secondary education. Gaps in educational attainment exist along racial/ethnic and economic lines: Low-income, first-generation, Latinx, Black, and Indigenous learners—who make up most of the population in California's public high schools—are less likely than their peers to finish high school, complete the A–G coursework necessary for admission to the University of California (UC) and California State University (CSU), enroll in college, and graduate from college.<sup>26</sup> Gaps in educational attainment also exist geographically, with coastal regions far exceeding inland regions in the percentage of residents with post-secondary degrees;<sup>27</sup> this trend mirrors economic disparities between the coastal and inland regions, and also reflects the greater number of post-secondary institutions in coastal versus inland regions.<sup>28</sup>

Numerous reports identify barriers to post-secondary access and success in California, including:

- Overall college affordability and support for students' basic needs
- Lack of clear pathways and processes to get to and through higher education<sup>29</sup>
- Lack of coherence between K–12 and higher education as well as within the three public higher education segments<sup>30</sup>
- Limited seats and course availability
- Constrained capacity to use data to track and support students<sup>31</sup>

Affordability is a particular concern. The lowest-income students in California spend a significantly larger portion of their family income paying for post-secondary education than higher-income students, and half of California college graduates leave college with student loan debt averaging \$23,000.<sup>32</sup> While this is relatively low in national terms, debt is disproportionately concentrated among low-income students and students of color, presenting a distinct equity concern.

The pandemic has exacerbated challenges for California's post-secondary students, staff, and institutions. First and foremost, the pandemic has disproportionately affected the health of the Latinx population in California, with Latinx Californians comprising 55% of cases and 47% of deaths while they comprise only 39% of the state's population.<sup>33</sup>

Given California's high cost of living, meeting post-secondary students' basic needs was a major challenge before the pandemic, and these needs have intensified since the onset of the pandemic. As of July 2020, the percentage of students who expressed “a lot” of concern about paying for housing and food, affording adequate technology/internet, caring for family members, and maintaining personal health and wellbeing had more than tripled since before the pandemic.<sup>34</sup>

**Total enrollment in the California Community Colleges system dropped by 5.2% in 2020, course withdrawals increased by 55%, and course enrollment fell by 17%.<sup>33</sup>**

These concerns appear to have influenced some learners to stop out of college or to delay initial enrollment. Total enrollment in the California Community Colleges system dropped by 5.2% in 2020, course withdrawals increased by 55%, and course enrollment fell by 17%.<sup>35</sup> The decline in course enrollment was most severe for Black (23%) and Indigenous students (36%). First-time freshman enrollment at CSU is down 6% (though overall enrollment increased by 0.75%).<sup>36</sup>



## FINDINGS FROM STAKEHOLDER INTERVIEWS AND FOCUS GROUPS

To ensure that the Taskforce's recommendations were well-tailored to current needs and circumstances across California, it was important to hear directly from stakeholders on the ground. Interviews and focus groups were conducted with 196 individuals, including leaders from post-secondary institutions, K–12 school districts, nonprofit organizations, and workforce development agencies, as well as high school and college students in five California regions: the Bay Area, San Joaquin Valley, Inland Empire, Los Angeles, and Imperial Valley. The following key findings emerged from these interviews and focus groups.

### **The prevalence of racial injustice in higher education is a major barrier to student success.**

Racial injustice, combined with economic uncertainty and the removal of students from campus environments where they have relationships and support, is taking a toll on students' sense of belonging. Students in focus groups wondered aloud, "What is my place in the world? Am I going to be welcome at college?" Stakeholders raised concerns about the role of policing on campus, the prevalence of microaggressions and discrimination, instances of blatant racism, a lack of affirming and culturally responsive classrooms, and inadequate support for students to find community and belonging. It will take ongoing and consistent action—including faculty and staff mindset shifts and professional development—to support all students, particularly racially minoritized students, along the path to and through college.

*"There must be a commitment to equity—distribution of resources to address decades of disinvestment—to bring justice to how this pandemic has disproportionately impacted communities of color."*

**— Local Civic Leader**



**The pandemic has exacerbated existing inequities in society, heightening barriers to students meeting their basic needs.**

Students must meet basic needs in order to successfully engage in education. The pandemic has raised additional barriers to having these needs met, particularly for learners who were already experiencing disadvantage in the system. These needs include food, shelter, healthcare, mental health services, transportation, internet and device access, and emergency dependent care.

*“Students experiencing poverty are faced with choosing between going to school or working to support family and take care of siblings—parents didn’t have the luxury to work from home. Many are essential workers, putting responsibility on older children to take care of siblings or work.”*

**— K–12 Leader**

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**The digital divide—access to and cost of both adequate devices and internet connectivity with sufficient bandwidth—has been fully exposed and exacerbated by the pandemic.**

Particularly for low-income students and students in more remote areas, access to the internet can be extremely challenging. In some places, connectivity is not available, and in all places, connectivity adds to family expenses. For families with multiple students, a higher level of bandwidth is needed to accommodate K–12 learning and online college classes happening concurrently. In addition, homes must have multiple devices to effectively accommodate multiple learners engaged at the same time. While some colleges and universities tried to provide connectivity through WiFi hotspots and by working with internet providers or extending service to school parking lots, each approach came with its own challenges, creating additional costs or inconvenience. Internet access and appropriate devices must be considered a “basic need” for students who wish to pursue an education in the 21st century.

*“We’ve known for ten years that the connectivity issue is a real barrier to learning. Suddenly—with the pandemic—our educators are saying, ‘we must do something.’ The message isn’t new. We turned our heads, and it wasn’t a priority.”*

**— Nonprofit Organization Leader**

### **The pandemic has deeply impacted students' mental and emotional health.**

Due to the pandemic, many students lost on-campus social networks, personal and family income, access to housing and childcare, and learning supports like internet access, devices, and a quiet place to study. Some have experienced the severe illness and death of family and friends. Simultaneously, many students took on additional responsibilities at home. While students have been incredibly resilient in overcoming and persisting through these challenges, the combination of these stressors has been difficult for students to handle mentally and emotionally. Unfortunately, access to mental health services has been inconsistent for students due to a dramatic increase in demand, the challenges of services being offered in a virtual format, and lack of counselor diversity and cultural competency.

*"For students, they admit very publicly that they're experiencing depression because of what we're living through. We have virtual support for staff, but not enough."*

**— Higher Education Leader**

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### **Some California industries may not fully recover from the pandemic, which will disproportionately impact students prioritized in this report.**

The pandemic impacted industries dominated by Black and Latinx workers (e.g., tourism, construction, agriculture, manufacturing). Workforce experts believe that some of these industries may not fully recover to pre-pandemic levels due to increased reliance on technology and automation. This creates a need for speedy and agile workforce retraining and upskilling, and increases the importance of strong and direct connections between post-secondary education and the business community. Without them, California will lose critical talent, and families will miss out on the economic mobility they could have achieved.

*"We have seen a reduction in the size of the labor pool. There has been some drop in migration of labor. Some people are going home to care for family back in Mexico—it takes just small shifts in behavior to have a large impact on our workforce."*

**— Economic Development Partner**

**The unpredictable nature of the pandemic is a major factor that limits recovery efforts.**

The unpredictability of the virus and its effects causes leaders to hesitate on timelines for systemwide recovery. The availability of a vaccine, public health responses to the pandemic outbreaks, and new variants of the virus may influence recovery efforts across the state. Some institutions are choosing to maintain distance learning exclusively until conditions improve. For institutions operating on hybrid schedules, student compliance with social distancing guidelines is a key determinant of recovery.

*"We are anxious about the long-term outlook of how we come out of this. We are underserved, and we've had a lot of risk factors present for COVID, and we don't have a lot of health support. We're afraid we don't come out of it, and it may become endemic to us."*

**— P-16 Partner**

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**Decreased enrollment and budget cuts due to the pandemic exacerbate existing financial challenges and inequities in the higher education system.**

Across and within the three segments, higher education stakeholders perceive that funding is inequitable, and express concern that the volatility and unpredictability of state budgets will exacerbate, rather than address, these challenges.

*"There is a multiplicity of issues that will require investment in higher education, and I think post-COVID you're going to see even more complex behavioral impacts that will require us to really be thoughtful in our investment in higher education. Now, with these budget cuts due to lost revenue we have to do more with less in a more complex environment, an environment where students are going to have a multiplicity of social emotional issues walking into the classroom."*

**— Higher Education Leader**



**Connections between K–12 and post-secondary education are not strong and pervasive enough to support successful transitions for all learners.**

Qualifying for, applying to, and enrolling in a post-secondary institution is a complex, multiyear process. Because of this, students without a history of college-going in their families—students who are disproportionately low-income, older, and from communities of color—are at an inherent disadvantage. Many students are in need of high-touch advising to meet admission requirements and navigate the admission and financial aid process, but existing resources in schools and the nonprofit sector are stretched thin. This challenge has been exacerbated by the pandemic, with students struggling to receive information and guidance that was easier to access when school was conducted in person. Students need clear post-secondary degree roadmaps to follow, as well as advising and data systems that support their success at every step of preparation and transition.

*"We have a new counselor who has been here for a year, but I don't depend on her and I'm not comfortable asking her questions. I'm a dual enrollment student, so when I need something I depend on my advisor, not my counselors. My advisor is my freshman year counselor, and she's my A–G advisor now and I depend on her."*

**— High School Student**

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**Connections between higher education and the workforce are insufficient to meet the economic and workforce needs of California.**

As a result, students often do not see a clear connection between post-secondary programs and achieving their career goals. Career information and advising, degree pathways, credit for prior learning, mastery-based learning, internships and other work-based learning opportunities, and micro-credentials are all approaches that can help students find their way through to post-secondary credentials and to gain valuable work experience along the way. Strengthening connections between higher education and employers is important to helping students prepare for and select in-demand jobs that will support the state's economic recovery in an equitable and sustainable way.

*"We need a much more dynamic work-based learning and experiential learning piece to our community college system. It's the missing piece to the experience we provide our students. Simple changes [are needed]—most work experiences are capped at 16 units, so they do that as a very small part of their elective experience."*

**— Higher Education Leader**

**Lack of flexibility and coherence within the higher education system creates barriers to student success.**

For example, without a common course numbering system and comprehensive transfer policies, students struggle to transfer credits between institutions and to plan out a coherent roadmap to earning their degree. In addition, students find the process of applying for financial aid—and understanding what it does and does not cover out of the “true cost of attendance”—to be inaccessible. Policies intended to support students, such as the Fifty Percent Law, can limit the flexibility of institutions to tend to student needs (e.g., advising) and limit statewide transferability.<sup>37</sup>

*“The transfer [degree]—ADT—is an example of a program from the state that was supposed to strengthen the transfer process, but it’s a mystery to most students, even those that qualified.”*

— Nonprofit Organization Leader

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**The completion and implementation of the statewide longitudinal data system will be critical to system redesign.**

Without a statewide data system, it is difficult to know how students are moving through the education pipeline and how best to understand both regional and statewide needs. The Cradle-to-Career Data System will protect student privacy, support intrusive advising, and illustrate students’ movement from K–12 to post-secondary, as well as across the three post-secondary segments and into the workforce. To support students at scale, it is critical to have data that tracks student retention, completion, time to degree, level of attainment, and workforce engagement.

*“There’s a real need for the post-secondary systems to get better about sharing data. Some systems are fragmented, but the state needs to figure out how to get the data to play together. If any state can figure that out, it should be California, but we’re behind other states.”*

— Higher Education Leader



**Because of the challenges and limitations of remote instruction, some students have come to believe that higher education is no longer worth the time, expense, and effort.**

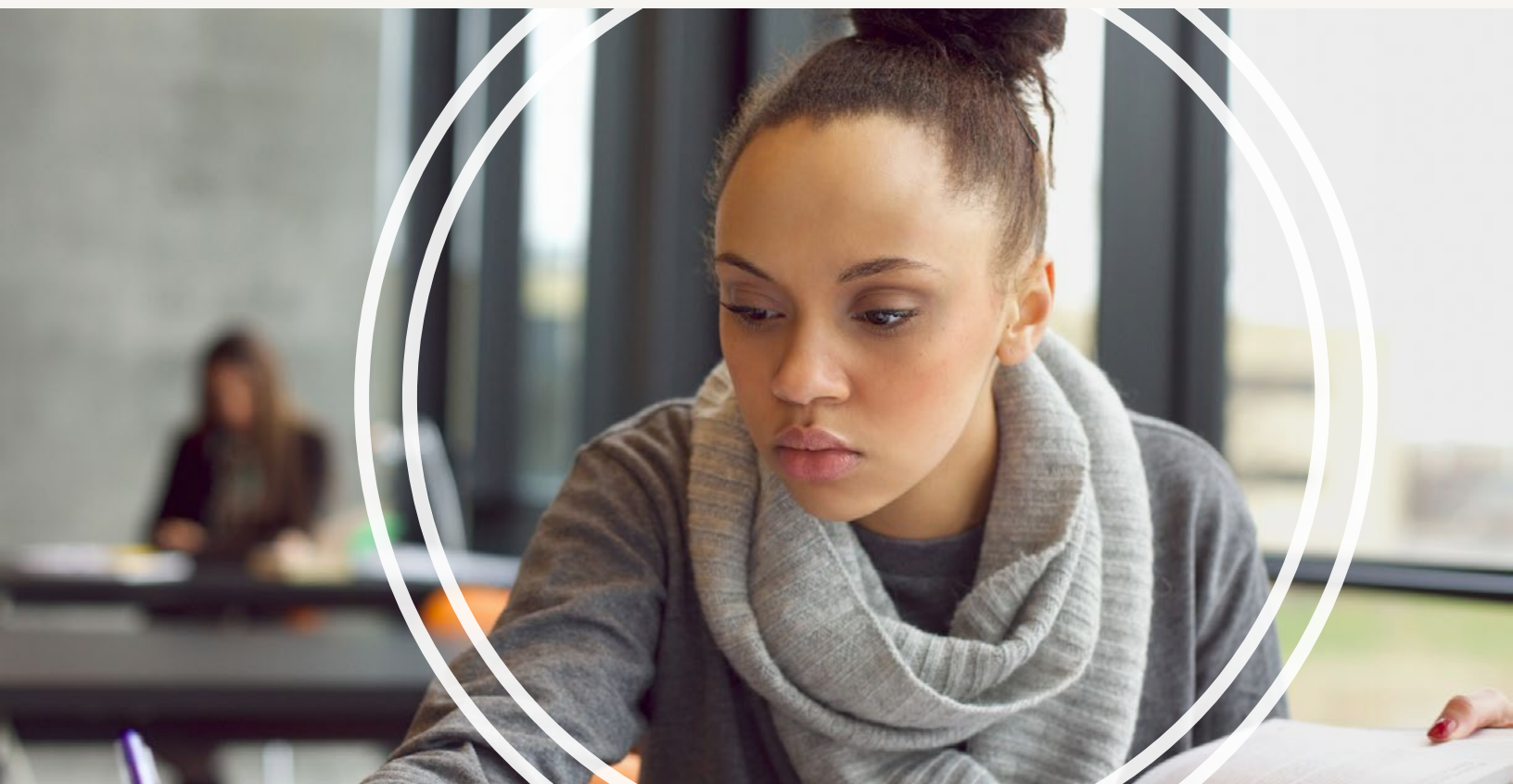
Students question whether the education they are receiving remotely will enable them to meet their career goals. They also perceive a lack of culturally responsive curricula and teaching practices, lack of flexibility in scheduling and assignments, and lack of empathy and engagement from their professors. Some students expressed that these concerns existed before the pandemic and have become worse under the switch to online classes. Because of this perceived mismatch between the cost of attending college—in both time and money—and the value of the education they are receiving, some students are re-evaluating whether they should invest in higher education at all and are considering dropping out permanently or stopping out until in-person instruction resumes.

*“The instructors should be expected to perform at their best level like they expect the students to do. We need to get what we’re paying for!”*

**— College Student**

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**Based on these findings, the Taskforce has developed a set of recommendations to address the challenges post-secondary students and institutions face in recovering with equity from the pandemic.**



# Recommendations

The recommendations in this report are a set of interconnected and interdependent systemic solutions meant to fundamentally change the way California supports all of its residents in equitably preparing for and engaging in education and careers. California's institutions and systems of education are dedicated to serving students, but must fundamentally shift to a learner-centered perspective that is proactive and prioritizes the supports and structures that will help all learners thrive. To do this work, higher education must collaborate within and across segments and with key partners, including K–12 education, nonprofit organizations, and employers. Independent institutions, which are an integral part of California's higher education system, are invited to join these efforts and to adopt or adapt these recommendations to meet the needs of their student populations.

The Taskforce identified four guiding principles that comprise the recommendations:



## Fostering Inclusive Institutions

Institutional cultures and approaches to teaching and learning that work for all learners, especially those left behind.



## Streamlining Pathways to Degrees

An integrated statewide system for admission and transfer to provide clear, easy-to-navigate pathways to degrees.



## Facilitating Student Transitions

High-touch, high-tech guidance and improved academic preparation for college access and success.



## Simplifying Supports for Student Stability

Resources and structures packaged and simplified to help students meet basic, digital, and financial aid needs.



Each guiding principle includes three key components:

**PROBLEM**

What is the issue, why does it matter, and how will addressing this issue impact priority student groups?

**GOAL**

What is the end state to be achieved, for whom, and within what timeframe?

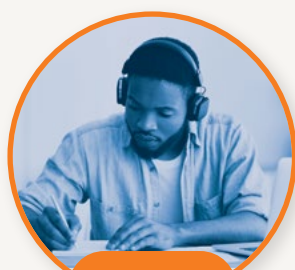
**STRATEGIES**

What policy, practice, and resource allocation are needed to reach the goal?



## Case Examples

To illustrate the impact of the Taskforce recommendations, this report includes case examples using the following fictional student personas. These personas are deeply informed by the interviews and focus groups conducted for this report, while protecting the anonymity of individual students.



**Erik**

**age 19**  
**Black**

*Erik grew up in a proud, historic community in Los Angeles. He lives with his parents and two younger siblings and commutes to a local community college. He hopes to eventually transfer to a CSU campus to earn a degree in nursing, but he worries about taking the right classes and whether he can even hope to be admitted to such a popular program. Even though his tuition is low, he works as much as possible to afford his car and also contribute to his family's household expenses. He also tries to help his younger siblings, who are attending school remotely. He wishes that his professors were more understanding of how hard it is to balance online classes, work, and family responsibilities.*



**Marisol**

**age 14**  
**Latinx**

*Marisol's parents immigrated to California and settled in the San Joaquin Valley. Seeing how hard her parents work motivates Marisol to excel in school. She would like to attend a UC to study engineering, but she worries about affording it. She also wonders whether her high school is preparing her to be successful in such a highly competitive academic program. She tried to talk to a counselor at her high school, but there wasn't an appointment available for several weeks.*



**Michaela**

**age 27**  
**Asian Pacific Islander**

*Michaela works at a day-care center in Oakland; it is not a high-paying job, but it provides discounted tuition for her three-year-old daughter. She loves working with children and is thinking about attending community college to begin the process of becoming a teacher, but she wonders whether she can manage work, parenting, and school. She sees ads online for for-profit schools and wonders whether that might be a faster and more certain route to a teaching job.*



# Fostering Inclusive Institutions

*Institutional cultures and approaches to teaching and learning that work for all learners, especially those left behind.*

## PROBLEM

**Institutional cultures and classrooms are not shaped around the experiences of students of color and adult students—and this impacts student success.**

The pandemic and the nationwide racial reckoning have only exposed and exacerbated the mismatch between who California's students are and how they are served.

An equity-focused institutional culture is needed to promote the success of Black, Latinx, Asian Pacific Islander, Indigenous, and adult learners. When an institutional culture is inclusive, diverse, and equity-centered, we know students are “better educated and better prepared for leadership, citizenship, and professional competitiveness.”<sup>38</sup> In addition, an equity-centered institutional culture is key to successful implementation of the Taskforce's other recommendations.

*“One thing that has negatively impacted me is that there are no African American studies courses on my campus. It's offensive, it's really hurtful, and it's not helpful to developing my identity.”*

— College Student

## GOAL

**By 2030, learners of all backgrounds will report that they are valued, supported, and affirmed at their institutions; that faculty are adept at creating courses that are responsive to and build upon the unique experiences, needs, and talents of all learners; and that post-secondary institutions actively support their academic success and career readiness.**

Inclusive institutional cultures recognize and value students as key partners and sources of expertise. Such cultures reflect an asset-based approach, recognizing the contribution that students' unique backgrounds and experiences bring to the educational environment, making the curricula relevant to students' unique experiences and interests, and helping students thrive through cultivating a sense of belonging. Within an inclusive and anti-racist institutional culture, faculty hold the same aspirations and standards for all students and believe in their capacity to achieve. Such a culture benefits all students, regardless of background.

To implement inclusive cultures, higher education leaders and institutions must design and advance systems that meet students where they are by providing relevant resources, culturally competent learning environments, recognition of students' family and work commitments, integration of career-relevant knowledge and skills, and equity-oriented curricula and course pathways.

As outlined in the strategies that follow, developing inclusive institutional cultures requires transforming professional development and hiring practices, improving classroom experiences, and aligning student supports.

## RECOMMENDATION 1

### Improve Faculty, Staff, and Administrator Diversity

An equitable and inclusive culture cannot exist if campus personnel do not reflect the rich diversity of California. Expanding faculty, staff, and administrator diversity requires dedicated, intentional efforts bolstered by strong data monitoring and accountability.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Adopt and implement **innovative hiring practices** to increase faculty, staff, and administrator diversity, including equity-centered outreach and duty statements, inclusive minimum qualification and selection processes, cluster hiring, diversity in hiring committees, exit interviews, and first-year onboarding programs.
- Redesign **Equal Employment Opportunity (EEO) plans** to uplift equity-centered practices throughout all aspects of employment process and retention. These documents should be tools for reflection and innovation, not compliance.
- Include a periodic **review of progress on EEO plans in board agendas** at the segment and local levels.

### Practice Changes at the Segment and Institutional Levels:

- Develop **supports for diverse faculty, staff, and administrators**, such as mentorship opportunities and newly hired communities, to improve retention rates.
- Provide **boards and administrators with professional development** on fostering a diverse and inclusive workplace.
- Foster **collaboration between faculty preparation programs and campuses** to effectively support the next generation of California educators.
- Empower faculty, administrators, staff, and students to **report instances of microaggression, harassment, or discrimination**, and provide safe, anonymous reporting channels. Ensure that campus policies support increased reporting.
- Collect **comprehensive quantitative and qualitative data** throughout all aspects of the employment process, and ensure that institutions track and act upon this data to address diversity, equity, and inclusion issues. Necessary data must be disaggregated and include:
  - Demographics by employee type, including interim positions and rank
  - Tenure of administrators
  - Courses taught by adjunct faculty by department
  - Investments in equal opportunity employment practices
  - Departures by department, employee type, and rank
- Hold institutional leaders responsible for developing plans outlining specific **diversity goals and strategies** to reach each goal, practicing data transparency, conducting diversity reviews/audits to identify problems, identifying staff to address problems as they arise, and incorporating progress on diversity goals into performance reviews.

### Resources Needed:

Institutions should allocate funding and staff time toward the diversity-oriented hiring and retention practices recommended. Segments and institutions also should devote resources to quantitative and qualitative data collection related to faculty, administrator, and staff diversity, and dedicate professional development to workforce data analysis and action planning, with the goal of shifting from a compliance mindset intent only on meeting legal requirements to the transformation of the system. Data should be collected during the pre-hiring, hiring, and retention stages. While some new resources will likely be required to build more robust data systems, the greatest resource required is likely to be staff time for data analysis, monitoring, and follow-up.

## RECOMMENDATION 2

### Cultivate Inclusive, Engaging, and Equity-Oriented Learning Environments

System and local boards, faculty, administrators, and staff need professional development, resources, and support to redesign the learning environment so that it better serves all learners.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Enact legislation **mandating that each segment upskill all board members, staff, faculty, and administrators** with training and professional development in implicit bias, cultural competency/fluency, and effective teaching techniques for diverse learners, targeting 2022 for completion of first-round professional development.
- Empower and **incentivize faculty, staff, and administrators to diversify the curricula, incorporate career-relevant learning experiences** (such as work-based learning), and recognize progress through administrator and staff evaluations and through the faculty tenure and review processes, with a target of significant course and program redesign by 2025.
- Ensure that **programs of study incorporate on-ramps and off-ramps** for learners who must attend to other priorities (e.g., work, caregiving).

#### Practice Changes at the Segment and Institutional Levels:

- **Re-envision curricula** across disciplines to be anti-racist and equity-centered and foster a sense of belonging among students. In partnership with faculty leaders, institutional leaders should develop metrics to monitor curriculum redesign. For example, students' course evaluations could include a question pertaining to whether the course content aligned with principles of diversity, equity, and inclusion.
- Implement **culturally competent teaching and learning practices**, which include routinely assessing instruction from a diversity, equity, and inclusion perspective.
- Incorporate **equity-centered practices** into teaching and learning, grading, annual evaluations, and faculty review/tenure processes.
- Create culturally responsive and easily accessible **channels for students to report instances of hate, discrimination, and microaggressions**, and implement restorative justice-centered practices to address those behaviors.
- Embrace teaching and learning practices based in research on **effective teaching techniques for adult learners** and that reflect and value the knowledge, skills, and experiences of adult learners.
- Include **adults and programs that focus on adults** (e.g., continuing education programs) in institutional and system goals.
- Provide the option for **competency-based courses and programs** to affirm the college and work experience of all learners.

- Integrate **work-based learning across the segments**, and throughout all disciplines, to better prepare learners for their desired careers and to make programs more relevant and responsive to learners' interests and goals. Develop metrics to track progress on implementing work-based learning.
- Engage **employers as partners and stakeholders**, not just as passive consumers, to ensure that post-secondary programs meet current and anticipated statewide and regional workforce needs; also engage these partners to provide work-based learning and teach courses.

### Resources Needed:

Existing professional development funding can be repurposed to prioritize equity-oriented training. Some new funding and considerable staff time will need to be identified to develop professional development modules, redesign curricula and courses, and draft model evaluation and tenure review processes.



### CASE EXAMPLE: WHEN EDUCATORS CAN RELATE

*When Erik registered for classes, he was glad to see that some of his professors were Black. He looked forward to taking their classes, knowing that they might be able to relate to his background and experiences as well as the many competing demands on his time. In one of his classes, Erik's professor led a discussion about implicit and explicit discrimination in healthcare, as well as the importance of healthcare workers being sensitive to the needs and concerns of the Black community. This discussion helped Erik feel seen, respected, and affirmed. By pursuing a career in nursing, Erik felt confident that he could not only support his family, but also make a difference in his community.*



### RECOMMENDATION 3

## Retain Students through Inclusive Supports

To develop an affirming and supportive culture that promotes student wellbeing and academic success, institutions must intentionally, thoughtfully, and creatively evaluate and, as necessary, redesign current support activities and develop new practices and programs.

### Policy Changes at the State, Segment, and Institutional Levels:

- Expand programs that **promote students' representation and sense of belonging** (e.g., identity-based resource centers, outreach programs, etc.).
- Develop a **statewide approach for California students to access certain supports** (e.g., campus food pantries) regardless of campus/system affiliation.
- Review the **role of policing in higher education**, evaluating its impact on institutional culture, particularly for Black, Latinx, and Indigenous students; adopt community-based approaches for addressing campus safety issues (e.g., mental health counselors, crisis response teams) as appropriate.
- Develop **research-based metrics for evaluating campus climate** and its impact on student success and retention. Examples of potential data to collect include measures of learners':
  - Sense of belonging
  - Experiences with discrimination and harassment
  - Perceptions of the degree to which the campus promotes diversity across race, gender, sexual orientation, and ability
- Hold institutional leaders and governing boards responsible for ensuring that institutions have plans outlining **specific goals for these metrics, and strategies to reach each goal**. Such plans may leverage existing campus climate data as appropriate.

### Practice Changes at the Segment and Institutional Levels:

- Cultivate a **stronger sense of inclusion** among students by fostering opportunities for students of different backgrounds to build community with one another and by encouraging students to be better stewards of campus climate.
- Offer **academic and student support programs year-round and outside the traditional work week** to better serve learners with work or caregiving obligations.
- Foster **collaboration and alignment among student support departments** (e.g., Basic Needs and Office for Students with Disabilities) and between **student and academic affairs**.
- Empower **students to engage in diversity, equity, and inclusion** work by recognizing their expertise, providing them with mentorship, and incorporating them into decision-making (including the review of EEO plans and hiring practices).
- Empower **faculty with student support information**, integrate the information into course syllabi, and encourage appropriate referrals to campus programs and lead staff.



### Resources Needed:

Segments and institutions will need to provide resources to support collaboration among student support services and faculty (e.g., funds for joint programming, percentages of staff time focused on establishing collaborative initiatives, etc.) and research on the impact of campus climate on student success/retention (e.g., dedicated time for existing research positions or the creation of new roles).



*"To aid California's recovery we must uplift student voices and create equity-centered institutions of learning. At the core of this work is an ecosystem that fosters inclusive, diverse, and equity-centered teaching and learning; in other words, the cultural transformation of our higher education systems is critical. We will succeed by supporting educators to lead culturally competent learning environments and by systematically designing equity-oriented curriculum, course pathways, and student supports."*

**— Dr. Daisy Gonzales, Taskforce Member and Deputy Chancellor,  
California Community Colleges Chancellor's Office**





# Streamlining Pathways to Degrees

*An integrated statewide system for admission and transfer to provide clear, easy-to-navigate pathways to degrees.*

## PROBLEM

**Historically, the process of applying to college has been unnecessarily complex and time-consuming, creating immense challenges for families and learners, particularly those without prior college experience.**

As a result, many learners (disproportionately Black, Latinx, Indigenous, Asian Pacific Islander, and adult learners) have opted not to apply to or attend colleges for which they are qualified.<sup>39</sup> Californians should not be dissuaded from applying to college, or from transferring between institutions, due to finances, family or work considerations, or bureaucratic hurdles. To reduce these challenges and address their impact on college persistence and completion, a three-pronged approach to reforming college admission and transfer is proposed.

*“I’ve had two different counselors—it depends who is looking over your curriculum, your classes, and that affects your schedule. The one I had earlier had something different planned for me than the next one. That’s one big point while transferring. I think it depends on the counselor how they explain and what resources they provide.”*

— College Student

## GOAL

**By 2030, learners will have clear, easy-to-navigate pathways into and through post-secondary education, as well as admission and transfer processes facilitated by an integrated technology platform, dual admission, and common course numbering.**

All students, but particularly Black, Latinx, Indigenous, Asian Pacific Islander, and adult learners, will benefit from the availability of college-going pathways that guarantee seamless integration of early college credit, dual admission, transfer, and reverse-transfer to support the timely completion of their post-secondary goals. Anchored by an integrated technology platform, learners will be supported along their individual pathways in anticipation of a college journey in which they take classes from at least two post-secondary institutions. Once established, this system will offer more effective planning for prospective students, guidance counselors, outreach programs, and admission professionals, and will also increase collaboration among institutions.

### INTEGRATED TECHNOLOGY PLATFORM

*The creation of an integrated technology platform is a critical strategy referenced throughout the Taskforce's recommendations. The platform will provide learners with an easy-to-use, single point of access to applications, tools, data, resources, and digital supports across California's vast education and social services systems. Throughout this report, the numerous ways the platform can help advance equity for learners and formalize collaboration across institutions and systems are described in detail. The initial steps for developing the platform have already taken place with the state's investment in a Cradle-to-Career Data System that is integrated with the California College Guidance Initiative.*



## RECOMMENDATION 4

### Establish an Integrated Admissions Platform

California should create an integrated technology platform to streamline the currently overwhelming and excessively complex application and transfer processes. Designed well, such a platform also can help colleges and universities better manage enrollment, integrate recognition of students' existing knowledge and skills through credit for prior learning and mastery-based learning, plan for course delivery, and address capacity constraints. The development of an integrated technology platform will take extensive coordination and investment as described below.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Approve the creation of an **integrated technology platform** that facilitates a common application for admission and transfer to California public institutions of higher education.
- Explore possible **legislation mandating a singular system integrated with the California College Guidance Initiative (CCGI) and the Cradle-to-Career Data System**.
- Ensure that the single platform includes a **dual admission function**.
- Develop **policy changes across community college, CSU, and UC segments** to align to a singular application system, including common admission deadlines, application requirements, etc.
- Discern a **funding formula for allocating application revenues** across parties.

#### Practice Changes at the State, Segment, and Institutional Levels (including associated platform design elements):

- Scaffold the integrated platform on top of an **existing system** (such as CCGI)<sup>40</sup> and align it with the statewide Cradle-to-Career Data System and its operational tools.<sup>41</sup> The platform should allow for an application/enrollment process to all public institutions in which **high school transcript data and previously earned credits at California public institutions pre-populate** into the application.
- Create a **single repository for student transcripts** across high schools, community colleges, CSU, and UC (prioritizing high schools and community colleges initially).
- Develop **intersegmental post-secondary degree program roadmaps** to promote efficient course-taking behaviors across educational sectors, and embed these roadmaps in the technology platform so learners and their advisors can plan ahead and track progress. This effort can build on the work of the CCGI.<sup>42</sup>
- Develop a **bundled application fee structure** that does not discourage learners from applying.

### Resources Needed:

Dedicated resources from the state will be needed to design and create the integrated technology platform, including software and system development to build the platform, as well as technical staff to operate the platform in collaboration with institutions. Extensive planning time also will be needed for the architects and managers of each segment's existing admissions and transfer systems to work with the developers of the integrated technology platform to design and implement back-end system integration.

Faculty and administrators from K–12 and post-secondary segments will need time to collaborate to develop intersegmental post-secondary degree roadmaps. This work could be modeled after the state's existing intersegmental coordination efforts (e.g., the K–12/community college College and Career Access Pathways agreements and the Associate Degree for Transfer).



Erik

### CASE EXAMPLE: WHEN COURSES TRULY CONNECT

*As Erik thought about enrolling in his local community college, he wondered whether he'd be able to transfer to a CSU to complete a nursing degree. He shared his concerns with his friend Marcus who already attends community college. Marcus assured him that there had been some important changes that address just this kind of question.*

*At Marcus's urging, Erik visited the college's website. When he typed "nursing" into the search box, he was directed to a degree map that outlined the courses he could take at the community college that would transfer directly into a CSU nursing program. Encouraged, he clicked on the "apply now" button and was directed to a statewide admission platform. The admission site explained that, if he applied for dual admission and was accepted, his place on the CSU campus would be assured. A few weeks later, Erik was notified that he qualified for dual admission to the CSU. Getting into the competitive nursing program would be dependent on completing his initial courses within two years and the grades he earned at the community college, but at least he knew that if he followed the degree map and worked hard in those courses he could reach his goal of becoming a nurse.*

## RECOMMENDATION 5

### Streamline and Unify the College Admission Process

Recognizing that most learners attend more than one college in order to earn a degree, California public institutions should adopt a streamlined and unified admission process, enabled by an integrated technology platform, that provides an option for dual admission to smooth the pathway for learners who wish to attend a four-year institution but begin at a community college. Similar to the commitment community colleges have already made to dual enrollment opportunities, dual admission would incentivize community college students to enroll full-time and continuously, with the assurance that they have been accepted to a four-year college and would be prioritized for programs and services (such as priority registration) to keep them on track. The successful creation of a streamlined and unified college admission process will require collective commitments across multiple fronts.

#### Policy Changes at the State, Segment, and Institutional Levels:

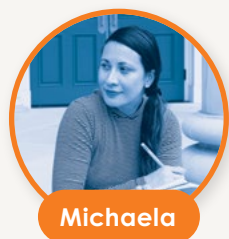
- Develop a **unified admission process** for all California public post-secondary institutions.
- Require segments to create a **two-tiered, guaranteed dual admission process**<sup>43</sup> to a campus and major of choice for otherwise qualified applicants who are missing up to three courses in their A–G sequence in math or language (Tier I) or who are UC/CSU-eligible but did not apply (Tier II). Design the dual admission process to allow learners to complete their first two years at a community college with guaranteed admission to a specific UC or CSU prior to beginning their community college courses.
- Allow learners who are dually admitted to **take advantage of resources (e.g., library, gym, etc.) at the nearest UC or CSU campus** while attending a community college.
- Adopt policies, such as **priority course registration** for dual admission applicants, increasing the likelihood that learners can complete their lower division courses within two years.
- Develop a **four-year financial aid package for dually admitted students that accounts for the total cost of college attendance**, that braids together institutional, state, and federal resources, and that offers financial support predictability for learners.
- Expand **prior learning assessment and the recognition of prior learning credits** in the transfer process.<sup>44</sup>
- Enact policy that would **automatically admit high school seniors to** their local community college or workforce training program, with the option to opt out if they have other post-secondary plans in place. Based on their high school records and assessment of prior learning experience, and enabled by the integrated technology platform, proactive guidance and advising would be provided to assist students with next steps in the enrollment and registration process.

### Practice Changes at the Segment and Institutional Levels:

- Recommit to **accelerating the widespread, consistent implementation of the Associate Degree for Transfer (ADT) program** as a statewide vehicle to facilitate streamlined and transparent pathways for student transfer from community college to four-year institutions.
- Target **high-impact communities for initial implementation**, including communities with high-need school districts and/or community colleges with historically low transfer rates.
- Partner with **workforce development agencies, high school counselors, and outreach programs** to identify on-track learners and equip these partners with access to a tool such as the California College Guidance Initiative (CCGI).<sup>45</sup>
- Implement **college knowledge supports and outreach** for high-potential learners and their families, including workforce training applicants and soon-to-be high school graduates.
- Synchronize **admissions and transfer timelines** across all public post-secondary institutions.

### Resources Needed:

Strategic investment to encourage the creation and adoption of a streamlined and unified admission system can begin by targeting initial implementation in high-impact communities where CCGI is well-established. This initial implementation must include outreach that is conducted by professional, community-based, multilingual champions trained in cultural competence. Expansion beyond initial implementation should occur simultaneously with the scale-up of CCGI to provide the data to help all institutions identify Tier I and Tier II learners.



### CASE EXAMPLE: WHEN STUDENTS FIND VIABLE OPTIONS

*Michaela found out that her local community college had an advisor who could help her get college credit for the training she received in her job at the daycare center. She was skeptical, but made an appointment. When she arrived, she was surprised to see plenty of older students on campus. The advisor explained that there were*

*several ways Michaela could earn college credit both for the formal courses she had taken and by demonstrating her knowledge and skills. The advisor also showed how the courses she could take at the community college would transfer directly into a B.A. program that could lead to a teaching credential. Michaela was especially happy to see that, with an associate's degree, she could qualify for a teacher's aide position at a public school. This job would provide much better benefits than her current one and still give her time to care for her daughter. Later, when her daughter starts kindergarten, Michaela could think about continuing on for her bachelor's degree and teaching credential.*



## RECOMMENDATION 6

### Develop a Common Course Numbering System

To streamline transfer from two- to four-year institutions and reduce excess credit accumulation, California's community colleges must adopt a common course numbering system, starting with general education requirements and eventually expanding to transfer pathway courses. The aim would be to align all community college courses so that students transferring to four-year institutions know, as they are pursuing their courses, that they are meeting the requirements of the receiving institutions. General education courses would be targeted for common course numbering by 2023, while transfer pathway courses would be targeted for 2025. The effort to establish a common course numbering system will be extensive, requiring a multi-level, sequenced approach. The development of common course numbering would also help to facilitate reverse-transfer.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Mandate that **community colleges work together** to develop a common course numbering system to facilitate transfer and reverse transfer.
- Create a **standard for transferring between semester and quarter units**.
- **Tie funding to courses** in the community colleges that are a part of the common course numbering system with clear pathways into CSU and UC.





### Practice Changes at the Segment and Institutional Levels:

- Foster institutional collaboration to **create standards for common courses**, as well as a “rubric” for more specialized courses, to ensure course credits are properly recognized and accepted across institutions.
- Encourage **communication and regional partnerships** to ensure that community college-CSU/UC articulation agreements are updated in real time with course numbering changes.
- Align **regional institutional offices to create seamless processes** for learners moving throughout regional systems and to help keep regional systems working in sync.

### Resources Needed:

Time will be the most valuable resource needed to develop a common course numbering system, including time for community college faculty to agree on course equivalencies and for institutions to align curriculum changes to allow for smooth transitions. In addition, institutions will need time to train counseling and admission staff to leverage the common course numbering system in order to make course equivalence and certificate/degree awarding processes automatic.



*We must tackle the systemic barriers that students face when matriculating through California's systems of higher education by utilizing existing and emerging technologies and resources. By recognizing the new reality for the majority of California's students that are increasingly diverse and intersectional, the erosion of these barriers is critical to an equitable recovery from the inequitable impacts that the pandemic continues to have on our students."*

**— Michael Wiafe, Taskforce Member and Former President of the California State Student Association**



# Facilitating Student Transitions

*High-touch, high-tech guidance and improved academic preparation for college access and success.*

## PROBLEM

**For K–12 learners in California, inadequate college preparation, limited advising and access to college information, and constrained access to early college experiences are key contributors to equity gaps.<sup>46</sup>**

Advising is limited at many public high schools, so students are often left to identify their academic and career interests and to navigate the college admission process on their own. In 2018–19, the student-to-counselor ratio in California was 612-to-1, well above the national average of 430-to-1 and the recommended ratio of 250-to-1.<sup>47</sup> The A–G course system makes it easier for students to identify courses that will qualify for UC and CSU admission, but access to these courses is limited at many California high schools. Because of these challenges, only half of California high school graduates complete the A–G course requirements necessary for admission to UC and CSU, and Black, Latinx, Indigenous, and some sub-groups of Asian Pacific Islander learners have significantly lower rates of A–G completion than their peers.<sup>48</sup>

Some high school learners gain early college exposure and earn early college credit—which is associated with positive outcomes including high school completion, college entry, improved college performance, credit accumulation, and degree attainment<sup>49</sup>—but many learners lack access to these early college opportunities and the benefits they confer.<sup>50</sup>

These challenges continue into higher education, where it can be difficult for students to choose an academic program and navigate the many rules and requirements, necessary forms, and deadlines. Beyond managing the college bureaucracy, students need to know that they have a knowledgeable, caring advisor to whom they can turn when they encounter difficulties.

Many of the obstacles students face can be addressed through greater K–12 accountability for college readiness, stronger advising in K–12 and higher education, and more opportunities for learners to experience college while still in high school.<sup>51</sup> If California does not address these institutional and informational barriers, thousands of learners across the state will be deprived of the opportunity and support needed to earn a post-secondary credential. This is all the more important to pandemic recovery as obstacles have been heightened and many learners and their families face even greater financial insecurity.

*"At my school we only have two counselors, one for every two grade levels. We have 500 students total. Those counselors are really packed with a lot of work. It's hard to keep in touch with them and difficult to get information you need. I can reach out to the counselor, but the ability to communicate with counselors is really rare at my school right now."*

— High School Student

## GOAL

**By 2030, learners in all public schools will have access to college preparatory coursework; early college experiences; and a high-tech, high-touch advising system that supports their success from middle school and high school into and through higher education and into the workforce.<sup>52</sup>**

Students require a combination of rigorous and relevant academic preparation and proactive support and advising to meet their academic and career goals. Improving college access and success and closing equity gaps in degree attainment require expansion of college preparatory course-taking and early college experiences, paired with state-of-the-art advising that blends data and technology with proactive, personalized support. An effective system such as this would start in middle school and continue through post-secondary.

## RECOMMENDATION 7

### Provide High-Tech, High-Touch Advising

The integrated technology platform (referenced in previous recommendations in this report), paired with a statewide chatbot accessible 24/7 via the web and mobile devices, would allow advisors to provide data-driven, high-tech, high-touch advising to support middle school, high school, and college learners on their pathways to degrees. The platform will ensure that middle school, high school, and college learners (and those who support them) can access all the information they need regarding students' educational records, college preparation, enrollment, financial aid, and progress toward a degree. The chatbot will use this information to identify and help students resolve routine problems, freeing up advisors to provide proactive, personal support.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Establish policies to create a statewide **integrated technology platform with a connected chatbot** that ensures middle school, high school, and college learners and their supporters can access critical information. This strategy builds on the groundbreaking work of Georgia State University, which has established national best practices for leveraging data and technology to improve student experiences and outcomes.<sup>53</sup> This technology will free up advisor capacity for important one-on-one advising of students.
- Create **integrated advising tools** within the technology platform and chatbot. These tools include an advisor-facing interface that helps advisors monitor their advisees' progress along personal, academic, and career goals, fueled by artificial intelligence (AI) technology that leverages predictive analytics to notify advisors when students get off track or have an important task coming up.<sup>54</sup>
- Establish a plan to assign learners most in need to a **professionally trained advisor**—beginning in middle school and lasting through college—who will provide encouragement and authoritative advice to facilitate their paths to high-quality post-secondary credentials.<sup>55</sup>



### Practice Changes at the State, Segment, and Institutional Levels:

- Ensure the platform and chatbot **leverage data to proactively provide high-tech, high-touch personalized support** to learners in middle school through college.<sup>56</sup>
- Design the integrated technology platform and chatbot so that **learners and their parents will be able to track progress to and through college** and find/ask for the information they need, which will, in turn, provide data for targeted messaging from the chatbot (and for some learners, targeted interventions from advisors) to encourage the timely completion of critical tasks and processes.
- Make the chatbot available through the technology platform and via **texting platforms** on users' phones, so they are able to send and receive messages directly as texts.
- Using artificial intelligence, send **"personalized" nudges to learners in targeted populations** (e.g., learners who have not submitted a form, failed to register for classes, or who are eligible for a scholarship or study abroad experience), with learners having the ability to ask immediate follow-up questions and receive automated, clarifying answers.
- **Customize the knowledge base for the chatbot** so that it provides higher-level answers that pertain to all post-secondary segments, provides more specific answers that pertain to particular institutions, and uses AI to target answers to learners based on their specific characteristics (e.g., region, grades, major, college campus, financial circumstances, etc.).
- Deploy the technology platform and chatbot to support **virtual one-to-one advising appointments** and to uniformly connect with K–12, community college, and four-year university technology platforms to foster a data-driven, collaborative, case-management approach to advising California learners.

### Resources Needed:

Building the integrated statewide technology platform and chatbot—and embedding advising tools within the technology—will require a significant startup investment along with ongoing financial support for system updates and maintenance. Technology costs increase with the potency of the tool: For instance, it is less expensive to deploy a chatbot that provides all students the same answer to the same question, and more costly but also more impactful to deploy a chatbot that deeply taps into data systems and uses AI to provide customized answers to questions based on students' individual characteristics. A core team of full-time staff will be needed to manage the integrated technology platform and chatbot on a daily basis, with professional experts in communication and social media approaches needed to supplement the technology team in the daily running of the platforms. Content experts from campuses, including faculty and learners, can be deployed to provide content and messaging and to maintain and update the chatbot's knowledge base.

With regard to advisors, assuming a 250-to-1 student-to-advisor ratio, a diverse group of roughly 2,000 advisors will be needed to provide support to 500,000 students deemed to be most in need of high-touch advising, and a small staff team will be needed to manage and support this network of advisors. A plan must be established for setting up and financing this system of advisors, created in partnership by K–12 and post-secondary systems.

## RECOMMENDATION 8

### Support College Preparation and Early Credit

Completing a college preparatory curriculum is important for high school learners' ability to transition and succeed in post-secondary education. A–G course completion sets learners up to be eligible for admission to CSU and UC, and earning early college credit—for example, through dual enrollment—not only gives learners credit toward a post-secondary degree but can also instill confidence in their ability to be successful in college. K–12 and post-secondary education should work together to make A–G coursework the default high school curriculum, strengthen K–12 accountability for college preparation, and expand access to early college experiences.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Strengthen **K–12 accountability for post-secondary preparation** using the College and Career Indicator (CCI)<sup>57</sup> to measure schools' success in college preparation, including A–G completion and default scheduling, AP course-taking, and other early college credit opportunities.<sup>58</sup> As recommended in a recent report by the Education Commission of the States, “Organizations will pay the most attention to the measures they are required to report. With that in mind, states' departments of education could include measures of college and career readiness on district and school report cards.”<sup>59</sup>
- Establish a plan to make **A–G coursework the default high school curriculum for all students**, with alternate programs available for students who choose to opt out of a college preparatory pathway.<sup>60</sup>
- Expand **early college credit opportunities**. Building on California's AB 288,<sup>61</sup> allow college classes to be taught on high school campuses exclusively for high school students and create College and Career Access Pathways (CCAP) partnerships between community college districts and high schools to offer dual enrollment courses that count for both a high school diploma and an associate's degree.

#### Practice Changes at the Segment and Institutional Levels:

- Provide **robust professional development** for faculty, administrators, and staff of middle schools, high schools, community colleges, and universities to improve college and career preparation, use of data, and advising.
- Establish **K–12/higher education teams to identify and dismantle barriers to A–G and early college course completion** for all learners, including constraints with regard to scheduling, instruction, and counselors.

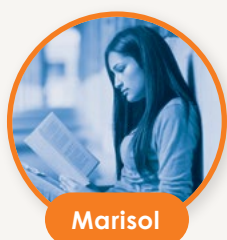


*“To reduce inequality in educational attainment we must better align our systems of education, reduce information barriers, and improve support for students navigating the road to a college degree.”*

— Michal Kurlaender, Taskforce Member and Professor and Department Chair, University of California, Davis, School of Education

## Resources Needed:

Dramatically increasing student participation in college preparatory courses will require resources to support K–12 teachers over an extended timeframe, especially given that students' eligibility for college preparatory courses is often determined by their experiences in elementary and middle school. To begin that process, resources will be needed to convene administrators and faculty from K–12 and post-secondary education, first at the state level and then locally, to determine the professional development, staffing, and other changes necessary to enable broad-based expansion of A–G course-taking. Similarly, staff from high schools and community colleges will require time to address barriers to expanded early college enrollment.



### CASE EXAMPLE: WHEN HELP IS ALWAYS AVAILABLE

*One day, Marisol is pulled out of class to attend a meeting in her high school guidance office. Worried that she is somehow in trouble, Marisol is relieved—and excited—to learn that she has been selected for a new program that will provide her with a dedicated advisor. She soon gets an email inviting her to meet virtually with her coach, Ms. Rodriguez.*

*At the meeting, Marisol tells Ms. Rodriguez about her dream of becoming a mechanical engineer and confides in her, asking questions about affording UC and being prepared for such a rigorous program. Ms. Rodriguez shows Marisol a degree map listing all the courses she should take in high school and the courses she will have to complete in college to earn an engineering degree. The advisor notes that there are several classes offered through the dual enrollment program with the local community college that meet the A–G admission requirements and will count toward an engineering degree. Ms. Rodriguez also shares that taking these courses will help Marisol decide whether engineering is right for her and may help her feel more confident in her preparation to succeed in that pathway. Before the meeting ends, Ms. Rodriguez shows Marisol how to establish an account on the statewide integrated technology platform. She explains that, not only is this the place to fill out her college application, it is also a means to find information, ask questions, and plan her next steps, which she can even do through an app and chatbot she can access on her phone. Soon after she signs up, Marisol receives a text about a financial aid information night that will be conducted in Spanish; she shows the text to her mom, who is relieved to know that college is within reach.*



# Simplifying Supports for Student Stability

*Resources and structures packaged and simplified to help students meet basic, digital, and financial aid needs.*

## PROBLEM

**One of the greatest challenges during the pandemic is that learners cannot adequately focus on learning because they must focus on meeting their basic needs.<sup>62</sup>**

These needs include food, housing, and access to technology necessary for college participation, as well as other foundational services such as transportation and dependent care. These challenges reduce the odds of college entry and completion for many learners, particularly those who stand to benefit the most from college attainment—hindering both individual economic mobility and the state's ability to recover from the pandemic-induced recession.

Basic needs security requires “an ecosystem that supports financial stability by ensuring equitable access to nutritious and sufficient food; safe, secure, and adequate housing (to sleep, study, cook, and shower); healthcare to promote sustained mental and physical wellbeing; affordable transportation; resources for personal hygiene care; and emergency needs for students with dependents.”<sup>63</sup>



The definition above from the University of California provides a thoughtful foundation for supporting learner needs. To further strengthen and update it for us across segments, it should be adapted to add the requirements of digital equity: affordable and reliable internet access as well as the technology devices needed for learning, particularly in light of the pandemic's implications for education.<sup>64</sup> Prior to the pandemic, the inability to consistently attend classes in person due to transportation issues led to students dropping out, failing to complete their coursework, and/or struggling to maintain good attendance. In the pandemic era, it is access to sufficient and reliable internet service that makes the difference. The effects of being unable to access the class, course, or instruction are the same. Support for both will be critical as pandemic recovery takes hold.

The Newsom Administration led public-private partnerships raising a total of \$3.9 billion in corporate and philanthropic funding during the first eight months of the pandemic to support Californians' basic needs.<sup>65</sup> In addition, the Governor's 2021–2022 budget proposes to invest \$100 million in one-time funds and \$105 million in ongoing funds to support basic needs at the public segments. While these investments are impressive, a more systematized ongoing approach to meeting basic needs for California post-secondary learners who qualify is necessary in the long term. Without it, students are making difficult short-term choices to stop out of higher education or delay enrollment.

Finally, state and federal student financial aid amounts have not kept pace with the increased costs of student basic needs, especially in high-cost areas of the state. The need-based Cal Grant is primarily designed to support tuition costs, leaving basic need costs to be covered from other funds (e.g., federal Pell Grants, student employment, and student loans).<sup>66</sup> Efforts to increase financial aid have been welcome, but more needs to be done to maximize the flexibility to address ongoing severe basic needs challenges, such as doubling the Pell Grant.<sup>67</sup> Without all students completing the FAFSA or CADAA form before leaving high school, however, California will have only a partial picture of what that focus could accomplish.

*"I know the school is doing a lot, like providing WiFi. But some families just can't afford it. How can we expect students to do well when their WiFi is cutting off, they're missing lectures, or they're getting kicked out of Zoom meetings."*

— College Student

## GOAL

**By 2030, learners will receive support to meet basic needs through a simplified, integrated system that enables qualified college students to access California's social services, subsidized internet and technology, and increased financial aid.**

Proactively supporting the basic needs of California college students can allow learners to prioritize focusing on their education, but it requires delivering that support differently. By working together across social service agencies, institutions, and regional/local partners, and by automating enrollment in these services, California can create a seamless system for qualified college students to access the state's robust social services (e.g., CalFresh; housing programs; healthcare, including mental health; direct aid; subsidized childcare; transportation; etc.) as well as federal, state, and institutional financial aid.

Meeting students' needs also requires treating access to fast, reliable, and low-cost internet as a basic need, legally and culturally, just as transportation to and from campus has been supported in the past.

Finally, California must create a pathway whereby learners can complete post-secondary education without having to take on additional debt, through a combination of refocusing and increasing student financial aid.

## RECOMMENDATION 9

### **Integrate Platform of State Services for Students**

Historically, students apply for financial aid as their main support to defray college expenses. But that solves only part of the challenge. Using the integrated platform previously described in this report, students could submit their financial aid application once and receive, in return, the full suite of supports for which they qualify (e.g., financial aid, CalFresh, housing programs, healthcare, mental healthcare, subsidized childcare, transportation, internet/technology access support, etc.). A unified application process would provide students with a complete picture of how they can earn a credential or degree and also ensure that their basic needs—and those of their family—can be met. This eliminates the need for students to apply separately for every support service they may need.

This integrated system also would provide all students, families, and advisors with a simplified, low-burden approach for completing the FAFSA and the California Dream Act Application (CADAA) prior to high school graduation and return timely information to support their next steps. Some of the services could be delivered directly from the state, and others—such mental health and counseling services—may be coordinated and delivered locally on campus or in the community where a student lives or attends class. This integrated and automated platform, which would combine financial aid and social service access with college application and advising as recommended in this report, can become a powerful one-stop shop for high school and post-secondary students and families.

### Policy Changes at the State, Segment, and Institutional Levels:

- Building on the early work of the CalFresh Work Group, create a multi-agency taskforce to identify any **existing legal barriers** (California or federal) to granting college students the ability to access the full suite of support services and **align these findings with the creation of the integrated Cradle-to-Career Data System** to ensure all institutions—K–12 education, post-secondary education, health services, human services, and others—are better able to **help students qualify for and use government support programs** to effectively access and complete their educations.
- Enable students to submit a **single application to access basic needs services alongside financial aid**. This will require data integration and data sharing across numerous local state and federal programs and agencies.
- Automate eligibility for services by **pre-populating the application** based on family income tax data and the Cradle-to-Career Data System.<sup>68</sup>

### Practice Changes at the State, Segment, and Institutional Levels:

- Determine the **extent to which student/family data submitted via the FAFSA or the CADAA is sufficient** to apply for and receive other state, local, and federal services. The multi-agency taskforce will identify any deficiencies in the FAFSA or CADAA to serve this added purpose and recommend solutions that provide the greatest ease for students and families.
- Build partnerships between post-secondary institutions, state agencies offering services, and **local community agencies, nonprofits, and employers** to communicate and coordinate service delivery locally for eligible students as appropriate.
- Design user-friendly **reports that clearly and succinctly communicate what financial and basic needs supports learners are eligible for** and identify contacts for learners seeking additional help in filling any remaining gaps of support that would prevent them from applying and enrolling.

### Resources Needed:

Resources required include significant dedicated staff time for the multi-agency taskforce. This taskforce would identify legal barriers and priority functionality for the integrated technology platform. It would determine what information (from the Cradle-to-Career Data System, state tax data, and financial aid databases) is required with a single application. The taskforce would also define the characteristics of the user interface and student reports. Funds will be required for technical experts to advise on and construct a user-friendly interface, integrate the data needed to produce individualized reports, and deliver reports to students in a secure fashion.

Institutions will need to assign staff to build partnerships with local agencies and service providers that bolster basic needs supports that the state may not provide. Institutions will also need to deploy staff to train advisors to engage with students on their individualized support package.

## RECOMMENDATION 10

### Subsidize Internet Access for Eligible Students

To provide subsidized access to reliable internet service for students who need it, this strategy calls for expanding the amount of funds offered through Cal Grant B and working with internet service providers to ensure they are offering their low-cost plans to all students who qualify for state or federal financial aid. This work builds on and amplifies the significant effort begun early in the pandemic, and it aims to institutionalize internet access as a basic need for learners. It also intersects with the recommendations of the *California Broadband for All*<sup>69</sup> report issued in late 2020.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Consider any **statutory changes necessary to mandate student access to low-cost technology/internet access programs** for students who qualify state and/or federal financial aid.
- Consider increasing the **stipend portion of Cal Grant B** to accommodate technology-related costs.



### Practice Changes at the State, Segment, and Institutional Levels:

- Explore partnerships with California's internet service and technology providers to offer **low- to no-cost technology access to college students with demonstrable need**, including promoting existing state contractual vehicles with internet service providers and equipment vendors to support cost savings and efficient purchasing of broadband services by local public entities.<sup>70</sup> This would be accomplished working through the California Broadband Council.
- Partner with internet service providers to **promote, track, and publicly report the progress of adoption of affordable internet services and devices** throughout the state (includes developing tools for low-income individuals and service organizations to identify and subscribe to affordable broadband plans).<sup>71</sup> This would be accomplished working through the California Broadband Council.
- Explore partnerships with local and county agencies and providers (e.g., libraries) to **expand WiFi and technology access in unserved and underserved geographic areas** in the immediate term. For some areas, it will be necessary for institutions to explore and adopt innovative technology and new partnership solutions to establish WiFi and technology access.

### Resources Needed:

The resources required for this strategy include dedicated staff time for post-secondary segments and/or institutions to participate in California Broadband deliberations and understand the options for partnership and purchasing. The work also demands dedicated staff time and modeling expertise to explore the implications and options for using Cal Grant B to support internet and device subsidies, and to determine if there are other funding sources that can be leveraged. Identifying and considering any needed statutory changes also will require staff time and conversations with leadership.

At the institutional level, it will be important to have dedicated staff assigned to exploring local partnership support for short-term efforts and determining which tools and purchasing opportunities (that might be developed through the Broadband Council) are available. The effort may require additional funds to make basic technology available at little to no cost for students who qualify.

## RECOMMENDATION 11

### Improve College Affordability

California would benefit from expanding opportunities for financial aid, including the opportunity to more robustly engage students in work opportunities (federal work study and others) that allow students to reduce their reliance on loans, gain relevant work experience, and earn their way forward with a reasonable workload that supports their academic progress. The California Student Loan and Debt Service Review Workgroup is already exploring creation of a pathway for learners to complete post-secondary education without having to take on additional debt, through a combination of refocusing and increasing student financial aid.

#### Policy Changes at the State, Segment, and Institutional Levels:

- Engage the Governor, state legislative leaders, California's congressional delegation, and its higher education and business leadership in a coordinated campaign to advocate **doubling the maximum federal Pell Grant and funding for the Federal Work Study (FWS) program**. Work to refine the distribution formula such that community colleges—many of which currently receive a disproportionately low amount of FWS relative to the significant numbers of low-income students they serve in California—receive a fair share of distributed funds.<sup>72</sup>
- Develop a **Cal Grant policy that provides equity for students by focusing award levels commensurate with the real cost of attendance** for students with demonstrated need. Design the policy to keep pace with the real cost of attendance.<sup>73</sup>
- Expand **paid internships and experiential education pilot programs**, such as the California Department of Public Health and California State University Internship Program.

#### Practice Changes at the Segment and Institutional Levels:

- Expand **campus-based employment and create a campus “minimum wage,”** which will enable students to meet a large percentage of their “self-help requirement” while maintaining a reasonable workload and not straining their academic progress.



*“Meeting basic needs is essential to helping students to be students first, creating a path for all to achieve their full academic potential. Removing barriers and streamlining access to existing services, coupled with a strong commitment to student financial aid, will bring greater opportunity for countless individuals and benefit the entire state. Best of all, these goals are within reach if the state commits to a focused, consistent effort.”*

**— G. Gabrielle Starr, Taskforce Member and President, Pomona College**

### Resources Needed:

Resources required for this strategy include time and people to design and implement the federal advocacy campaign, as well as additional data analysis to inform suggested changes in the distribution formula. Funds may be necessary for the California Student Aid Commission to convene and support an advisory group on refining and refocusing the Cal Grant program and for data modeling to understand options and likely outcomes of changes that group considers. Funds and staffing will be required to convene program directors, elevate best practices, and identify scaling opportunities for paid internships and experiential education pilot programs, as well as to support exploration of a campus minimum wage. Funds may be available through a combination of federal, state, and private philanthropic support<sup>74</sup> to accomplish this work.



### CASE EXAMPLE: WHEN STUDENTS CAN PLAN ON SUPPORT

*When Erik submitted his admission application, he was directed to complete something called the “FAFSA Comprehensive Student Needs Assessment.” With his mom’s help, he was able to authorize access to his parents’ tax records so the system would have information on the family’s income. After he answered several more questions, the system returned a report. Erik was surprised to see that in addition to showing how much financial aid he could get (he was happy to see the amount of Pell and Cal Grant funds he qualified to receive), the report also identified other benefits he could access, including CalFresh and a subsidy to help him pay for high-speed internet. Once admitted to the community college, Erik learned about additional local support services he was eligible to receive, such as mental health counseling provided through one of his community college’s partner organizations.*



# Next Steps

The Taskforce's recommendations are rich and complex, reflecting the needs of California's diverse population, the issues and challenges identified through stakeholder research, and the varied experiences and expertise of Taskforce members. Together, these recommendations create a powerful blueprint for California's higher education system to recover from the pandemic with equity at the forefront of all its activities. At this extraordinarily challenging moment in America's history, these recommendations may also seem daunting. How can California embark on such an ambitious agenda?

## Stakeholder Opportunities for Action

The answer to the question posed above lies with the commitment, drive, and creativity of Californians. From the Governor and legislators to faculty and students, many stakeholders have important roles to play in enacting these recommendations. As the Governor and the Governor's Council for Post-Secondary Education consider the Taskforce's recommendations, the following steps are offered as a starting point for key stakeholders to consider:

- **State Policymakers:** Pass legislation and prioritize resources to enact the recommendations. Hold segment leaders accountable for bringing the recommendations to fruition. Serve as public champions for the recommendations and support segment leaders as they negotiate change management.
- **Segment Leaders (senior leadership and boards):** Develop statewide and segment plans for implementing the recommendations, including metrics to monitor progress and accountability for results. As necessary, establish statewide working groups that bring together stakeholders and experts to design new systems, programs, and services. Adjust segment policies and strategic plans to incorporate the recommendations.
- **Institution Leaders (senior leadership, local boards, and administrators):** Integrate implementation of the recommendations into campus strategic plans and re-allocate staff and funds to support the work. Monitor progress and hold personnel accountable. Ensure that faculty and students play an integral role in implementation efforts.
- **Faculty and Staff:** Participate actively in professional development as well as curriculum and program redesign, incorporating input from students and employers. Embrace new teaching, learning, and advising techniques that better serve diverse learners. Collaborate across segments, campuses, academic departments, and student affairs to actively support students.
- **Students/Student Associations:** Advocate for the implementation of the recommendations before institutional, segment, and state leaders. Provide candid, direct, and ongoing input to all efforts to create a more inclusive campus culture; to streamline admission, financial aid, and transfer; and to improve college preparation and advising. Take full advantage of new opportunities as the recommendations are implemented.



- **K–12 Education Leaders:** Collaborate with post-secondary education colleagues to make college preparation the norm for K–12 students, expand early college credit opportunities, and strengthen advising. Partner in the process to streamline college admissions.
- **Business Community:** Participate in ongoing dialogue and collaboration with higher education leaders to help post-secondary education, at both the regional and state levels, make strategic adjustments to align with anticipated shifts in industry and workforce needs. Offer work-based learning opportunities, create more high-road jobs for graduates from diverse backgrounds, and build public support for the Taskforce's recommendations.
- **Nonprofit Organization Leaders:** Contribute perspectives and expertise to the development of the integrated technology platform, revamped admission and financial aid processes, and new advising services. Help ensure student, parent, and community input into plans for implementing the recommendations. Provide ongoing feedback on how well new programs and services are serving constituents.
- **Philanthropy:** Serve as conveners and trusted partners to support stakeholders as they wrestle with implementing the Taskforce's recommendations. Invest in elements of the recommendations where they align with mission and priorities. Hold leaders at all levels accountable by monitoring progress and identifying areas that need attention. Document, elevate, and celebrate progress on implementing the Taskforce's recommendations and eliminating equity gaps.



## Potential Outcome Measures

The Taskforce's recommendations are based on research and experience with regard to the interventions necessary for student success. Implementing these recommendations with fidelity should, over time, significantly reduce equity gaps in educational attainment and result in improvements in economic mobility for Californians who have not shared in the state's economic prosperity.

As stakeholders do this work, a core set of outcome measures will track whether their efforts are improving the college experience and closing gaps in preparation, access, transfer, and degree attainment. **These measures will need to be disaggregated by segment, institution, and student race/ethnicity, age, and other characteristics to ensure that the recommendations result in improved outcomes for priority student populations.**

Potential outcome measures to consider may include:

GUIDING PRINCIPLE	2030 GOAL	MEASURES OF EQUITY
<div></div> <div>Fostering Inclusive Institutions</div>	Learners of all backgrounds will report that they are valued, supported, and affirmed at their institutions; that faculty are adept at creating courses that are responsive to and build upon the unique experiences, needs, and talents of all learners; and that post-secondary institutions actively support their academic success and career readiness.	<ul style="list-style-type: none"><li>• Student surveys on campus climate</li><li>• Student retention</li><li>• Changes to academic programs and course descriptions</li><li>• Faculty and department chair survey on curricula and teaching and learning</li></ul>

*Continued on next page*

GUIDING PRINCIPLE	2030 GOAL	MEASURES OF EQUITY
 <p><b>Streamlining Pathways to Degrees</b></p>	<p>Learners will have clear, easy-to-navigate pathways into and through post-secondary education, as well as admission and transfer processes facilitated by an integrated technology platform, dual admission, and common course numbering.</p>	<ul style="list-style-type: none"> <li>• Enrollment and retention rates</li> <li>• Dual enrollment and transfer</li> <li>• Time and credits to degree</li> <li>• Graduation rates</li> </ul>
 <p><b>Facilitating Student Transitions</b></p>	<p>Learners in all public schools will have access to college preparatory coursework; early college experiences; and a high-tech, high-touch advising system that supports their success from middle school and high school into and through higher education.</p>	<ul style="list-style-type: none"> <li>• A–G course completion rates</li> <li>• Early college credit participation</li> <li>• College enrollment and success rates of recent high school graduates</li> </ul>
 <p><b>Simplifying Supports for Student Stability</b></p>	<p>Learners will receive support to meet basic needs through a simplified, integrated system that enables qualified college students to access California's social services, subsidized internet and technology, and increased financial aid.</p>	<ul style="list-style-type: none"> <li>• Student participation in social service programs</li> <li>• Student reports of food and housing insecurity and digital access</li> <li>• Unmet financial need and student indebtedness</li> </ul>

## Parting Reflection

Throughout its history, California has been a beacon of opportunity, attracting people from around the country and around the world. While many have used the state's extraordinary higher education system as a springboard to achieve their dreams, too often the promise of California has gone unfulfilled. The dual crises of the pandemic and racial injustice have laid bare these inequities in the starkest terms, with Black, Latinx, Indigenous, and Asian Pacific Islander communities most severely impacted. If California hopes to recover, it can do so by only addressing these persistent and growing inequities head-on.

Thankfully, there is hope. California has everything it needs to meet this challenge: a creative, vibrant, and diverse population; committed leadership in the public and private sectors; and institutions with a long history of innovation and achievement. California's system of higher education is an extraordinary asset that can be leveraged to provide real opportunity to all Californians. New leadership and priorities at the federal level—including a notable focus on community colleges—promises renewed attention to the challenges and opportunities we face. By working together to make the system more accessible, welcoming, and responsive to the needs and ambitions of all learners, Californians can ensure that the Golden State will fulfill its enduring promise to current and future generations.



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# Acknowledgements

- 77 Working Group Members
- 78 Stakeholder Participants
- 82 Focus Group Participants
- 83 Technical Advisors

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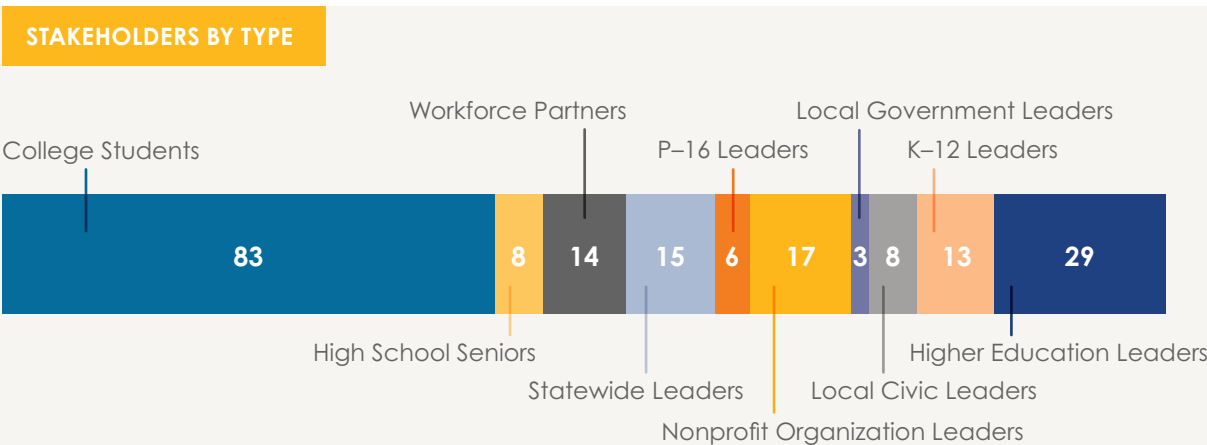
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Avenal High School,  
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Central Valley Higher  
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Imperial Valley College

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# Appendix

- 85 Recommendations at a Glance
- 86 Taskforce Equity Framework
- 87 Related Reports

## Recommendations at a Glance

The Recovery with Equity Taskforce developed recommendations to advance four guiding principles. These recommendations are a set of interconnected and interdependent systemic solutions meant to fundamentally change the way California supports all of its residents in equitably preparing for and engaging in education and careers.



### Fostering Inclusive Institutions

*Institutional cultures and approaches to teaching and learning that work for all learners, especially those left behind.*

1. Improve Faculty, Staff, and Administrator Diversity
  2. Cultivate Inclusive, Engaging, and Equity-Oriented Learning Environments
  3. Retain Students through Inclusive Supports
- 



### Streamlining Pathways to Degrees

*An integrated statewide system for admission and transfer to provide clear, easy-to-navigate pathways to degrees.*

4. Establish an Integrated Admissions Platform
  5. Streamline and Unify the College Admission Process
  6. Develop a Common Course Numbering System
- 



### Facilitating Student Transitions

*High-touch, high-tech guidance and improved academic preparation for college access and success.*

7. Provide High-Tech, High-Touch Advising
  8. Support College Preparation and Early Credit
- 



### Simplifying Supports for Student Stability

*Resources and structures packaged and simplified to help students meet basic, digital, and financial aid needs.*

9. Integrate Platform of State Services for Students
10. Subsidize Internet Access for Eligible Students
11. Improve College Affordability

## Taskforce Equity Framework

The Recovery with Equity Taskforce began its work by discussing a vision of recovery for post-secondary education in California and establishing the following set of equity commitments for each phase of the Taskforce process.

### The commitments that will hold us accountable to an equity-centered process.

#### Vision-Setting

We will agree to a shared understanding of **equity representation** and priority **stakeholder groups** in the development of an **equity-focused process**.

#### Research Collection and Data

We will collect **disaggregated data** and identify the impact of current strategies, policies, and programs on **priority stakeholder groups**.

#### Stakeholder Engagement

We will conduct multiple **regionally based virtual conversations** with stakeholders to better understand and incorporate the experience of those most proximate to the problem.

#### Solution Development

We will assign more weight in our coherence strategies to **strategies expected to have the greatest impact on equity** for the priority stakeholder groups of Black, Latinx, Asian Pacific Islander, Indigenous, and adult students in California.

#### Recommendations and Dissemination

We will **prioritize the needs of priority stakeholder groups** regarding policy, implementation capacity, and resource allocation, and ensure Taskforce recommendations are **accessible** to all stakeholders.

#### User-Centered Design

Stakeholders consulted

#### Co-Design

Stakeholders part of design team

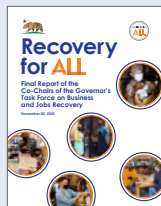
#### User-Created Design

Stakeholders as designers

*Spectrum of design power dynamics, from the equityXdesign Collaborative*

## Related Reports

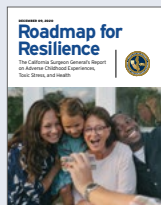
This report and its recommendations should be considered in context of a number of recent reports recommending reforms to rebuild and strengthen California's economy. These include:



Recovery for All: Final Report of the Co-Chairs of the Governor's Task Force on Business and Jobs Recovery  
(released November 2020)



State of California Social Innovation Report  
(released November 2020)



Roadmap for Resilience: The California Surgeon General's Report on Adverse Childhood Experiences, Toxic Stress, and Health  
(released December 2020)



Master Plan for Early Learning and Care: Making California For All Kids  
(released December 2020)



Cradle-to-Career Data System Legislative Report  
(released December 2020)



California Broadband For All: Broadband Action Plan 2020  
(released December 2020)



Master Plan for Aging  
(released January 2021)



Future of Work: A New Social Compact for Work and Workers  
(released March 2021)

A common throughline of this body of work is the role of colleges and universities in driving recovery and prosperity. Woven together, these reports can inspire a tapestry of reforms that will make California stronger across all economic sectors.

## About the Taskforce

The Recovery with Equity Taskforce was convened to envision a new approach for California's post-secondary preparation and workforce readiness. It was established in August 2020 by Governor Gavin Newsom's Senior Policy Advisor for Higher Education, Dr. Lande Ajose, in consultation with the Governor's Council for Post-Secondary Education. The Recovery with Equity Taskforce comprised California and national experts in higher education equity and innovation and was chaired by Dr. Ajose.

Learn more at:

**CAPostsecondaryForAll.org**  **@CAPostsecForAll**

## About the Author

Education First is a national, mission-driven strategy and policy organization with deep expertise in education improvement. Its mission is to deliver exceptional ideas, experience-based solutions and results so all students—and particularly low-income students and students of color—are prepared for success in college, career and life.



Learn more at [Education-First.com](https://Education-First.com).

## Support for this Report

The production of this report was funded by College Futures Foundation, which works to catalyze systemic change, increase college degree completion, and close equity gaps so that the dream of opportunity can become a reality available to every student—regardless of zip code, skin color, or income.



Learn more at [CollegeFutures.org](https://CollegeFutures.org).

## **COMMITTEE ON EDUCATIONAL POLICY**

### **Graduation Initiative 2025**

#### **Presentation By**

Fred E. Wood  
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#### **Summary**

This written item is a periodic update to the Board of Trustees regarding California State University's Graduation Initiative 2025. Specifically, the item details information on the efforts of a new Graduation Initiative 2025 Advisory Committee charged with identifying creative and innovative ways to eliminate student equity gaps systemwide. The final report summarizing recommendations of the Advisory Committee will be posted on the Graduation Initiative website.

#### **Background**

In one of his first acts as CSU Chancellor, Joseph Castro convened an Advisory Committee to provide recommendations for catalyzing systemwide efforts to eliminate the equity gaps across the CSU. The Committee, comprised of a cross-representational group of CSU stakeholders, drew upon its depth and breadth of expertise to deliver a series of recommendations designed to enhance the collective impact of all 23 campuses in ensuring that students from all backgrounds have equitable opportunities to earn a high-quality CSU degree.

The committee met via videoconference five times and concluded its work during a meeting on June 30, 2021. A report of recommendations, based on the committee's discussions, is being finalized.

#### **Emergent themes**

The following themes emerged as part of proposed recommendations and will be presented to Chancellor Castro for his consideration:

- Target courses with high non-passing rates with a focus on equity;

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- Support academic advising capacity, including implementing digital degree planning tools systemwide;
- Expand data-sharing and transparency;
- Improve critical course availability;
- Integrate basic needs support; and
- Establish accountability frameworks.



## **COMMITTEE ON EDUCATIONAL POLICY**

### **The Post-Pandemic Student Experience**

#### **Presentation By**

Fred E. Wood  
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#### **Summary**

When the California State University system pivoted to virtual instruction in spring 2020 as a result of the COVID-19 pandemic, the impact was felt well beyond the walls of the traditional classroom. In fact, the system's student affairs professionals – spanning a wide range of student services and programs from basic needs and residential life to financial aid, advising and student activities – were also faced with the challenge of supporting students in new and unprecedented ways. Along with their academic affairs and faculty colleagues, CSU student affairs educators stepped up and leaned in to meet students where they were during a year and a half that brought with it not only a public health crisis but economic distress and social justice disruption.

This written item provides an overview of the CSU student experience during the pandemic, including insights and best practices gained from the responsiveness of student affairs staff and administrators. In addition, this item provides an updated perspective of the role student affairs plays in supporting student engagement and well-being – factors which have been shown to contribute to improving student retention, closing student equity gaps, and reducing time to degree.

#### **Background**

Even before the global pandemic sparked a public health crisis, nationwide undergraduate students were reporting increased challenges with mental health. In a fall 2020 survey of more than 8,000 undergraduates by the American College Health Association-National College Health Assessment, the organization found that more than 45% of respondents reported stress as an impediment to academic performance. Another 35% listed anxiety and 26% listed depression. In the same survey, more than half reported problems or challenges with academics. UCLA's Higher Education Research Institute at UCLA fields an annual "Your First Year in College Survey" assessing the academic and personal development of students over the first year of college. The last report,

issued in February 2020, also pointed to increased levels of student anxiety. Half of respondents reported feeling anxious occasionally, while nearly 40% felt it frequently. Among those who reported feeling frequently anxious, nearly 68% said they had not used their campus psychological services.

Student well-being outside of the classroom is frequently linked to success inside the classroom. As illustrated in Abraham Maslow's theory of Hierarchy of Needs, human wellness is predicated on fulfilling needs based on priority – beginning at the basic needs of food, water and shelter. Once these are met, individuals then seek to meet higher-level needs such as security or a sense of belongingness. At the top of the hierarchy is achieving one's full potential. In this regard, in consort with students' classroom experiences, student affairs has the potential to create transformational, transcending experiences for our students. In some cases, student affairs is uniquely situated to promote learning for skills especially valued by employers – such as ethical decision making, leadership and competency to work effectively with diverse teams.

Taking a more holistic view of student well-being, UC Merced Vice Provost and Dean of Undergraduate Education Elizabeth Whitt articulates six conditions that matter to student success. They are: "living" mission and "lived" educational philosophy; unshakeable focus on student learning; environments adapted for educational enrichment; clear pathways to student success; improvement-oriented ethos; and a shared responsibility for educational quality and student success (Whitt, E. J., 2005). "Although there is no blueprint for creating a student success-oriented institution," she writes, "thinking about how these principles can be adapted to your institutional context and culture could make a positive difference in terms of student learning" (Whitt).

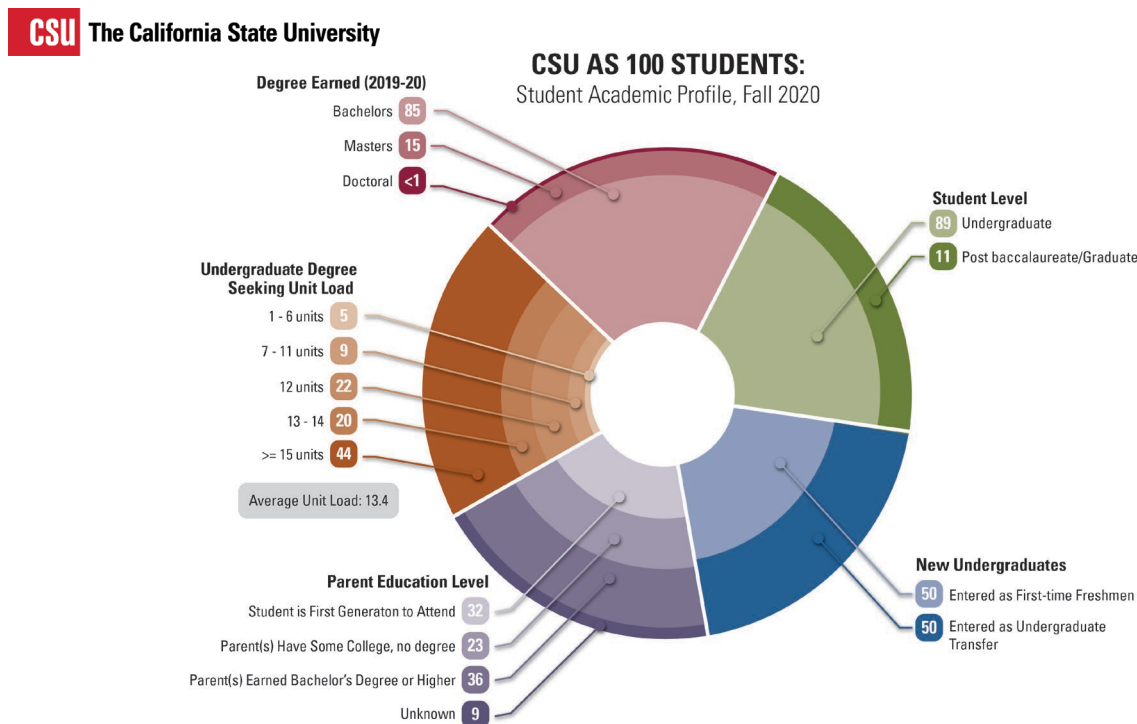
The CSU's Graduation Initiative 2025, created to increase graduation rates and close student educational equity gaps, has placed student success at the center of its efforts. The initiative features six pillars – or operational priorities – that contribute to student success, of which one is student engagement and well-being. As the initiative passes its five-year mark, it does so with progress in raising four- and two-year graduation rates and a renewed focus to eliminate equity gaps across all 23 campuses.

## **The Impact of Student Affairs**

### *CSU Students at a Glance*

As the largest public four-year university in the nation, the CSU has one of the most diverse student bodies in the U.S. This diversity contributes both to a richer learning experience as well as a much wider range of student needs. CSU student affairs educators support nearly half a million students a year. For fall 2020, approximately 58% identified as women and 42% as men. More than 16% of fall 2020 enrolled students were first year students, and nearly two-thirds of students are ages 18-24. Nearly 45% of students identified themselves as Hispanic or Latinx, more than 15% as Asian/Pacific Islander and four percent African American.

Below is a graphic example of what the student body would look like based on 100 students. For example, a sample 100 students from fall 2020 includes half entering as first-time college students and half as undergraduate transfer students. Further, more than half of all CSU students are first in their family to attend college; 50% of undergraduates receive a Pell grant; and nearly three-quarters of CSU students identify as Black, Indigenous or People of Color (BIPOC). Understanding and honoring the backgrounds, experiences and identities of the students whom we serve is important as we consider how we will best support their higher education access and attainment. Student affairs professionals are particularly essential to building bridges, eliminating barriers, re-envisioning services and providing safety networks for students who have historically been underserved by higher education.



### *Supporting Thriving Students*

When the pandemic hit, student affairs was called upon to support students where they needed it most – including providing housing, basic needs and mental health support. It is also important to note that the pandemic is only one example of how student affairs professionals have pivoted to respond to societal shifts. In the past, student affairs has responded to: HIV/AIDS, high-risk drinking, the rise of mental health challenges and, most importantly, the increasing racial/ethnic, economic and gender diversity of students. Student affairs has also been at the forefront when

responding to issues around freedom of expression and legislative impacts on students, including Title IX regulatory changes and court rulings, as well as changes in regulations affecting Dreamers and in immigration laws.

The full breadth of student affairs services and co-curricular programs include:

- Advising and coaching
- Basic needs
- Career services
- Child care centers
- Community building initiatives
- Disability accommodations
- Diversity, equity and inclusion
- Educational Opportunity Programs (EOP)
- Financial aid
- Housing and residential life
- Identity-based centers, such as black cultural centers, Dream Centers, Pride Centers, and Project Rebound
- Leadership development
- Learning support services
- Medical services
- Mental health
- Public health promotion
- Recreational sports and intercollegiate athletics
- Student clubs and activities
- Student conduct
- Student medical services
- Technology
- Transition programs, such as orientation and adult reentry support

Supporting a thriving student population is not only the right thing to do, it constitutes a substantial return on investment. An extensive body of research and anecdotal evidence consistently demonstrates that the strongest predictors of student persistence are academic preparation and student engagement. Further, student health – defined holistically – is an essential capacity for being an active, engaged learner. A student who fears for their safety, or who is grappling with untreated mental or medical conditions, cannot fully “show up” for college.

And while the CSU can and does have some impact on students’ academic preparation prior to coming to college, once they are admitted and enrolled with the CSU, academic preparation becomes more of a static attribute. However, the potential to enhance student engagement is nearly limitless. Student engagement can be defined as the degree of psycho-social and physical energy

invested on the part of the student as part of their overall experience. The theory of student engagement, and its correlation to student success, is that student gains in learning and development are proportional to the extent of the quality and quantity of investment in their experience (Astin, 1985; Martin & Torres, 2016).

The National Survey of Student Engagement defines student engagement as representing two critical features of collegiate quality: the amount of time and effort students put into their studies and other educationally purposeful activities and how the institution deploys its resources and organizes the curriculum and other learning opportunities to get students to participate in activities that are linked to student learning.

Student engagement – and, as such, student affairs work – is essential to: improving retention rates; closing educational equity gaps; and reducing time to degree. The key areas in which campus student affairs professional can contribute to enhancing student engagement can be organized into three categories. They are:

- Cognitive – which can include such things as quality of learning, level of intellectual challenge, and critical thinking skills, as well as curiosity and resilience;
- Social – which addresses collaborative interactions, interpersonal skills and discussions across difference, as well as sense of belonging; and
- Institutional – which encompasses campus climate, learning assistance, student activities, level of support services, and interactions with faculty and staff.

### **Lessons Learned from the Pandemic**

In many ways, student affairs can be viewed as two separate entities – one is the discipline and the other is the organizational structure. Student affairs work, that which develops and fosters out-of-classroom student learning, has the potential to occur in units and departments across nearly all cabinet areas, not just in the Division of Student Affairs. Student affairs as an organizational structure can vary greatly at each campus based on different administrative reporting structures. But regardless of their reporting line, student affairs professionals are generally unified by a community of practice and guiding values with a defined body of literature and scholarship.

It is that shared perspective of supporting student success through well-being and engagement which informed the CSU's response to student needs during – and now emerging from – the global pandemic. In addition to the benefits observed by CSU students and faculty in teaching and instruction, student affairs colleagues discovered that many of these changes also created new benefits for our students, including: leveraging technology to allow for more flexibility and availability in advising or telehealth; streamlining administrative processes such as offering online self-service scheduling and digitizing paperwork; and addressing more holistic student needs such as healthy eating and financial planning.

Expanding lessons learned in the virtual learning environment, the following is a brief overview of how student affairs adapted and, in some cases, created new and innovative ways to support students.

#### *Leveraging Virtual Solutions*

Embracing technology to increase responsiveness to students' needs was a central theme for student affairs. For example, chatbots, software applications that allow users to access a curated responses to common questions via text, were implemented to provide student interactive support services throughout the admissions and yield processes. YOU@College and other online platforms were adopted to facilitate remote access to health and wellness interventions. Online advisement tools were adopted and/or functional elements were better leveraged to meet student needs. Zoom event platforms supported career events with employers and outreach/recruitment events with high school counselors.

#### *Addressing Basic Needs*

Basic needs programs adopted creative strategies to continue to support students facing food insecurity, including providing curbside pickup of produce and other necessities. Campuses established a "mutual aid" agreement in which students could access the food pantry at a sister CSU campus. Funding from the legislative rapid rehousing allocation was utilized to support on-campus housing for students who were homeless. The CSU quickly procured a HIPAA-compliant version of Zoom to support counseling appointments. Technology was added to the definition of "basic needs" – helping to bridge the digital divide.

#### *Streamlining Processes and Eliminating Barriers*

Campuses reevaluated the necessity for students preparing hard copy forms, with the need to obtain multiple wet signatures, to see if these could be replaced with online forms using digital signatures. Campuses expanded options for students to schedule, cancel and/or reschedule online appointments with a variety of student services providers.

#### *Redefining Community and Belonging*

Virtual activities and events afforded increased access for students who may have been more geographically challenged to attend on-campus events prior to the pandemic. For example, a number of recreational sports departments initiated or expanded eSports offerings, allowing some students to access recreational programs who may not have formerly done so. Other campuses hosted virtual mental health support groups. Maintaining connection and community, in particular for the CSU's historically underserved and/or marginalized student communities, remained a top priority for campuses. Dream Centers, cultural centers and other identity-based centers utilized student peers and leveraged online technologies whenever possible. The online environment was also leveraged to better serve older adult students, working students and students with families by expanding or offering different student services hours and creating more opportunities to connect with advisors.

### *Fostering Cross-Collaboration*

The remote modality also allowed for more cross-collaboration among CSU campuses and therefore CSU student and faculty participation beyond the home/sponsoring campus. A few examples included the hosting of the Basic Needs Research Consortium via a virtual gathering that enabled larger group of faculty researchers across the campuses to participate and collaborate on research agendas. The Basic Needs Ambassador Training was also hosted in a virtual modality which allowed for greater participation across campuses.

The pandemic revealed some of the deeper complexities of challenges CSU students face, such as consistent access to the internet and a dedicated computer or the impact of residing in multi-generational households where some struggled with access to dedicated space for studying and the privacy to make use of student health and mental health services. Yet it is also important to recognize that some student populations thrived in the virtual learning environment. Many students from these populations experienced higher grades and/or improved connection to the campus because of the flexibility the virtual environment provided, which allowed them to better balance work schedules, family responsibilities and transportation/commuting issues.

### **A Post-Pandemic Student Affairs**

Approaching 2025 and beyond, California faces a declining birthrate and fewer numbers of new high school graduates. Yet, the need for an educated workforce will continue to increase. To meet its mission, the CSU will have to successfully attract and graduate a broader cadre of students – more adult students, including returning students with some college but no degree and first-time older students looking to expand career or employment options. Yet, even more traditional-age students are expecting to interact with their campuses in a multitude of modalities: for example, living on campus and being active in associated students and sports clubs, while taking the majority of their classes online. Campus populations will continue to reflect greater racial and ethnic diversity.

For all students, the expectation to provide holistic support will only grow: the ability to address holistic wellness and basic needs will become a core expectation. This will necessitate leveraging the experiments of the pandemic and determining what to institutionalize, so as to better serve the students of today and tomorrow. These students will demand choice and flexibility when it comes to time, place, and modality of instruction and service provision. As such, in order to move forward in a manner consistent with promoting an equitable post-pandemic recovery, programs and services for enrollment management, student affairs, and diversity/equity/inclusion will need to strategically and thoughtfully embrace a hybrid approach going forward.

## **Conclusion**

As was the case in cities through the nation, the most vulnerable of CSU students felt the some of the most significant impact of the COVID-19 pandemic. It was not unusual for students to find themselves facing food or housing insecurity. Further, the population of students in need also grew exponentially, many of whom were asking for assistance for the very first time.

As disruptive and challenging as the pandemic was to the CSU student body, it also revealed the strength and responsiveness of student affairs. As the student population continues to grow and evolve, so too must the student affairs area as a discipline and as a structure. Without these necessary services and supports, the foundation of student engagement and well-being will be impacted and, so too, student success. Given the students it serves and its commitment to inclusive excellence, the CSU must sustain strategic investments in student affairs programs and services in order to support higher education access and attainment. Their effort to engage students can often make a critical difference in supporting students' persistence.



## AGENDA

### COMMITTEE ON INSTITUTIONAL ADVANCEMENT

**Meeting:** 2:15 p.m., Tuesday, July 13, 2021  
Virtually via Teleconference

Jean P. Firstenberg, Chair  
Douglas Faigin, Vice Chair  
Diego Arambula  
Debra S. Farar  
Anna Ortiz-Morfit  
Christopher Steinhauser

- Consent** 1. Approval of Minutes of the Meeting of January 26, 2021, *Action*
- Discussion** 2. Naming of The KPBS Conrad Prebys Media Complex – San Diego State University, *Action*
3. Naming of Prebys Stage – San Diego State University, *Action*
4. Naming of the CSU Shiley Haynes Institute for Palliative Care, *Action*

**MINUTES OF THE MEETING OF  
COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

**Trustees of the California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**January 26, 2021**

**Members Present**

Jean P. Firstenberg, Chair  
Douglas Faigin, Vice Chair  
Diego Arambula  
Adam Day  
Anna Ortiz-Morfit  
Romey Sabalius  
Joseph I. Castro, Chancellor  
Lillian Kimbell, Chair of the Board

Trustee Faigin called the meeting to order.

**Approval of Minutes**

The minutes of November 17, 2020, were approved as submitted.

**Naming of the George and Judy Marcus Hall for Liberal and Creative Arts – San Francisco State University**

Mr. Ashley reported that the proposed naming recognizes the transformative \$25 million gift by George and Judy Marcus. The gift established the George and Judy Marcus Funds for Excellence in the Liberal Arts, which endowed two new faculty chairs in the Creative Writing Department and two in the School of Cinema. The funds also support the renewal of facilities, as well as faculty and student research through the George and Judy Marcus Awards for Faculty and Student Research.

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the January 26-27, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**

San Francisco State President Lynn Mahoney, Lieutenant Governor Eleni Kounalakis and Chancellor Joseph I. Castro shared the impact of the gift and thanked the Marcuses for their ongoing generosity and service to the university. Mr. and Mrs. Marcus shared videotaped remarks expressing their appreciation.

The committee recommended approval by the board of the proposed resolution (RIA 01-21-01) that the new liberal and creative arts building at San Francisco State University be named the George and Judy Marcus Hall for Liberal and Creative Arts (Marcus Hall).

### **Annual Report on Donor Support for 2019-2020**

Mr. Ashley reported that the CSU had another record-breaking year with \$641 million in gifts commitments, surpassing the previous record by 13%. In addition, gift receipts totaled \$408 million, which was 10% more than last year. He thanked the campus advancement teams for their resolve, adaptability and creativity in responding to the pandemic and budgetary challenges.

Ms. Lori Redfearn, assistant vice chancellor for systemwide advancement, presented additional highlights from the donor report and shared information on how campuses adapted to emerging needs over the last fiscal year.

The committee recommended approval by the board of the proposed resolution (RIA 01-21-02) that the Annual Report on Donor Support for 2019-2020 be adopted for submission to the California Joint Legislative Budget Committee and the California Department of Finance.

After the presentation, Trustee Faigin acknowledged the many CSU alumni who participated in last week's inauguration.

Trustee Faigin adjourned the meeting.

## **COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

### **Naming of The KPBS Conrad Prebys Media Complex – San Diego State University**

#### **Presentation By**

Larry Salinas  
Vice Chancellor  
University Relations and Advancement

Adela de la Torre  
President  
San Diego State University

#### **Summary**

This item will consider naming the KPBS building at San Diego State University as The KPBS Conrad Prebys Media Complex at Copley Center.

This proposal, submitted by San Diego State University, meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Facilities and Properties, including approval by the system review panel and the campus academic senate.

#### **Background**

The proposed naming of the facility recognizes the \$8 million contribution by The Conrad Prebys Foundation for KPBS's comprehensive campaign - Building on Trust: The Campaign for KPBS. The gift will be used to update and expand the KPBS facilities and technology.

Through this innovative expansion, KPBS is entering a historical transition that will pave the way for a bright future. It has moved from being only a TV and radio station to a multi-media organization, and the intersection of on-demand content has created a paradigm shift in the way it conducts business. The Campaign for KPBS is creating the opportunity to stay relevant, reach new audiences and engage coming generations.

Mr. Conrad Prebys believed in the power of philanthropy and gave generously to many causes he felt passionate about. One of these passions was supporting local drama, education, and arts and culture at KPBS. Mr. Prebys had a long history of philanthropy towards KPBS and supported the station with several major gifts while he was alive and even after his passing, in 2016, through support of his foundation.

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**Recommended Action**

The following resolution is recommended for approval:

**RESOLVED**, by the Board of Trustees of the California State University, that the KPBS building at San Diego State University be named as The KPBS Conrad Prebys Media Complex at Copley Center.

## **COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

### **Naming of Prebys Stage – San Diego State University**

#### **Presentation By**

Larry Salinas  
Vice Chancellor  
University Relations and Advancement

Adela de la Torre  
President  
San Diego State University

#### **Summary**

This item will consider naming the Second Stage Theatre of the new Performing Arts District at San Diego State University as Prebys Stage.

This proposal, submitted by San Diego State University, meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Facilities and Properties, including approval by the system review panel and the campus academic senate.

#### **Background**

The proposed naming of the Second Stage Theatre recognizes a \$6 million dollar grant awarded by The Conrad Prebys Foundation for the development of San Diego State University's new Performing Arts District and a new theatre for student productions and rehearsals.

Mr. Conrad Prebys was a significant supporter of SDSU and previously through his personal giving and estate donated close to \$25 million to the university to support students, including the Prebys Creative and Performing Arts endowed scholarship. To ensure his vision extended beyond his life, Mr. Prebys created The Conrad Prebys Foundation to perpetuate his commitment to philanthropic endeavors in San Diego. SDSU applied during the Foundation's inaugural grant making cycle and was awarded a capital building grant to support the performing arts.

This grant is a transformational gift that will provide for a state-of-the-art venue that facilitates excellent training and performance opportunities for SDSU students and faculty, as well as a quality performing arts experience for the greater community.

SDSU's vision is to offer the highest quality performance training, visual, digital and other opportunities to all students regardless of need. The visual and performing arts professional schools at SDSU believe in the power of art to heal, to reaffirm and to drive social change. While SDSU's College of Professional Studies and Fine Arts strives to develop a talented, diverse and effective workforce for the arts, a major impediment to performing arts education is the speed of change in technologies, software, hardware and performance modalities. The \$6 million-dollar award allows SDSU to invest in technology for a 'mobile-first' generation; to train for, develop and create custom content for students and industry partners in performance, music, film, television and gaming.

### **Recommended Action**

The following resolution is recommended for approval:

**RESOLVED**, by the Board of Trustees of the California State University, that the Second Stage Theatre of the Performing Arts District at San Diego State University be named Prebys Stage.

## **COMMITTEE ON INSTITUTIONAL ADVANCEMENT**

### **Naming of the CSU Shiley Haynes Institute for Palliative Care**

#### **Presentation By**

Larry Salinas  
Vice Chancellor  
University Relations and Advancement

Ellen Neufeldt  
President  
California State University San Marcos

#### **Summary**

This item will consider naming the CSU Shiley Haynes Institute for Palliative Care, a multi-campus collaborative, located at California State University San Marcos.

This proposal, submitted by CSU San Marcos, meets the criteria and other conditions specified in the Board of Trustees Policy on Naming California State University Schools, Colleges, Programs, and Other Academic and Non-Academic Units, including approval by the system review panel.

#### **Background**

The proposed naming of the academic institute recognizes cumulative commitments of \$6 million by Mrs. Darlene Marcos Shiley and The Shiley Foundation, of which \$4.9 million has been received.

Mrs. Shiley's support is in line with one of her larger philanthropic priorities—healthcare—as well as pays tribute to her late husband, Donald P. Shiley. Mr. and Mrs. Shiley personally experienced the benefits of palliative care as Mrs. Shiley cared for her husband when his health declined. After Mr. Shiley's passing in 2010, Mrs. Shiley remained dedicated to ensuring that his legacy of philanthropy continued. Mrs. Shiley has dedicated herself to creating a culture of philanthropy across various sectors in San Diego County including arts, higher education, community services, and health and scientific research.

At the request of Mrs. Shiley in 2019 as part of her most recent gift to the Institute, CSU San Marcos agreed to pursue adding President Emerita Karen Haynes' name to the Institute to honor her years of campus leadership. Following the requisite two-year waiting period post retirement for an individual who has served the CSU in an administrative capacity, Mrs. Shiley affirmed with current CSU San Marcos President Ellen Neufeldt that she desired to continue pursuing adding Dr. Haynes' name to the Institute name.



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**Recommended Action**

**RESOLVED**, by the Board of Trustees of the California State University, that the California State University Shiley Institute for Palliative Care located on the California State University San Marcos campus be named the CSU Shiley Haynes Institute for Palliative Care.

## **AGENDA**

### **COMMITTEE ON GOVERNMENTAL RELATIONS**

**Meeting:**      **2:45 p.m., Tuesday, July 13, 2021**  
**Virtually via Teleconference**

Douglas Faigin, Chair  
Krystal Raynes, Vice Chair  
Diego Arambula  
Jack Clarke, Jr.  
Jean P. Firstenberg  
Jack McGrory  
Romey Sabalius  
Lateefah Simon

**Consent**      1. Approval of Minutes of the Meeting of May 18, 2021, *Action*  
**Discussion**    2. State Legislative Update, *Information*

**MINUTES OF THE MEETING OF  
COMMITTEE ON GOVERNMENTAL RELATIONS**

**Trustees of the California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 18, 2021**

**Members Present**

Debra S. Farar, Chair  
Maryana Khames, Vice Chair  
Silas H. Abrego  
Diego Arambula  
Douglas Faigin  
Jack McGrory  
Krystal Raynes  
Romey Sabalius  
Lateefah Simon  
Joseph I. Castro, Chancellor  
Lillian Kimbell, Chair of the Board

Trustee Farar called the meeting to order and recognized the valuable contributions that Trustee Abrego has made as a member of the committee and as chair of the committee during his time on the board.

**Approval of Minutes**

The minutes of March 23, 2021, were approved as submitted.

**State Legislative Update**

Mr. Larry Salinas, vice chancellor for university relations and advancement, reported that the Office of Advocacy and State Relations has continued to engage with legislative offices and staff as they prepared for policy committee hearings. They have also continued to execute the budget

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the May 17-19, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**

advocacy strategy for the year, which will be vital to the CSU's overall success during the final weeks of the budget process.

Ms. Nichole Muñoz-Murillo, assistant vice chancellor for advocacy and state relations, gave an update on the board sponsored legislation (AB 940 McCarty), as well as bills addressing financial aid reform, student basic needs and improving transfer pathways across the state. She also highlighted budget advocacy efforts for full restoration of the CSU budget, investments in Graduation Initiative 2025 and one-time infrastructure investments. They have been working closely with the CSU Alumni Council as strong advocacy partners, and Chancellor Castro has continued to meet with key budget leaders and members of the legislature.

Trustee McGrory expressed his concerns about SB 22 (Glazer) and believes that the CSU should pursue its own bond with the University of California. He also raised issues with AB 927 (Medina) on behalf of Academic Senate regarding community college duplication of CSU programs. Trustee Raynes had questions regarding AB 1456 (Medina). Trustee Taylor expressed his support for AB 1111 (Berman). Trustee Sabalius was pleased with the bipartisan support for AB 940 (McCarty) and shared that Academic Senate has objections regarding AB 927 (Medina) and opposes AB 928 (Berman). Lt. Gov Kounalakis shared that she co-authored AB 1111 (Berman) and AB 928 (Berman) because it is student-centered legislation consistent with the longstanding efforts to simplify the transfer process. She hopes that with continued negotiations that eventually the CSU can move to a support position.

Trustee Farar adjourned the meeting.

## **COMMITTEE ON GOVERNMENTAL RELATIONS**

### **State Legislative Update**

#### **Presentation By**

Larry Salinas  
Vice Chancellor  
University Relations and Advancement

Nichole Muñoz-Murillo  
Assistant Vice Chancellor  
Advocacy and State Relations

#### **Summary**

The Legislature passed their house of origin deadline to move introduced bills to the second house for consideration. Leadership limited each member to 12 bills that may advance to the second house this legislative year. This has resulted in a higher than normal number of bills no longer advancing.

This report is organized as follows:

- Board of Trustees sponsored legislation
- Active Bills
  - Senate bills
  - Assembly bills
- Bills no longer advancing
  - Senate bills
  - Assembly bills

All bill summaries are accurate as of June 29, 2021.

### **Sponsored Legislation**

#### **AB 940 (McCarty) – College Mental Health Services Program**

This bill appropriates \$20 million from the Mental Health Services Fund to expand student mental health services at the California Community Colleges (CCC), the CSU and the University of California (UC).

- **CSU Position:** Sponsor
- **Status:** This bill was held on the Assembly Appropriations Suspense File.

### **ACTIVE BILLS**

#### **Senate Bills**

#### **SB 22 (Glazer) – Education Finance: School Facilities: Public Preschool, K-12, and College Health and Safety Bond Act of 2022**

This bill enacts a school facilities bond act for 2022, which if approved by voters, would authorize \$15.5 billion in bonds for K-16, of which \$4 billion would be divided equally between the UC and the CSU.

- **CSU Position:** Support
- **Status:** This bill is awaiting hearing in the Assembly Education Committee.

#### **SB 26 (Skinner) – Collegiate Athletics: Student Athlete Compensation and Representation**

This bill accelerates current law allowing compensation for student athletes for name, image and likeness from Jan. 1, 2023 to September 1, 2021 and adds an urgency clause.

- **CSU Position:** Tracking
- **Status:** This bill is awaiting hearing in the Assembly Appropriations Committee.

#### **SB 367 (Hurtado) – Student Safety: Opioid Overdose Reversal Medication**

This bill requires the CSU and the CCC, and requests the UC, to maintain opioid overdose reversal medication in all student health centers. Additionally, campuses must provide educational and preventative information about opioids during new student orientations as well as instruct students on the use and location of opioid overdose reversal medications on campus.

- **CSU Position:** Support
- **Status:** This bill is awaiting referral in the Assembly Rules Committee.

**SB 395 (Caballero) – Healthy Outcomes and Prevention Education Act: Excise Tax: Electronic Cigarettes: Health Careers Opportunity Grant Program**

This bill imposes a tax on vape products and creates the Health Careers Opportunity grant Program to fund various programs to expand the numbers of underrepresented students in the health professions.

- **CSU Position:** Tracking
- **Status:** This bill is set for hearing in the Assembly Health Committee on July 13.

**SB 416 (Hueso) – Corrections: Educational Programs**

This bill requires the California Department of Corrections and Rehabilitation to offer college programs provided by the CCC, the CSU, the UC and non-profit colleges to California inmates with a GED or a high school diploma.

- **CSU Position:** Pending
- **Status:** This bill is awaiting hearing in the Assembly Appropriations Committee.

**SB 453 (Hurtado) – Agriculture: Biosecurity and Emerging Infectious Disease Fund**

This bill creates the Biosecurity and Emerging Infectious Disease Fund in the State Treasury and allows federal, state, local and private resources to be continuously appropriated to the Fresno State Jordan Ag Research Center.

- **CSU Position:** Tracking
- **Status:** This bill is awaiting hearing in the Assembly Appropriations Committee.

**SB 512 (Min) – Support Services for Foster Youth: Cooperating Agencies Foster Youth Educational Support Program**

This bill changes the requirement for priority enrollment of foster youth and former foster youth to those whose dependency was established on or after an individual's 13<sup>th</sup> birthday.

- **CSU Position:** Support
- **Status:** This bill is set for hearing in the Assembly Human Services Committee on June 30.

**SB 701 (Committee on Education) – Federal GI Bill: Nonresident Tuition: Real Property**

This is the higher education omnibus bill, which makes noncontroversial and clarifying amendments regarding postsecondary education.

- **CSU Position:** Support
- **Status:** This bill is set for hearing in the Assembly Appropriations Committee on June 30.

### **Assembly Bills**

#### **AB 99 (Irwin) – Statewide Longitudinal Data System: California Cradle-to-Career Data System: Governance and Support**

This bill establishes the mission and governing structure for the statewide longitudinal data system.

- **CSU Position:** Pending
- **Status:** This bill is awaiting hearing in the Senate Education Committee.

#### **AB 104 (Gonzalez, Lorena) – K-12 Education: Learning Recovery Opportunities: COVID-19**

Among the bill's provisions to address K-12 learning loss due to COVID-19 impacts, this bill requires a school to allow a student in the 2020-21 academic year to request a change to their letter grade to a pass or no pass on the student's transcript and requires the CSU and encourages the UC and private higher education institutions to accept the transcript for admissions purposes.

- **CSU Position:** Tracking
- **Status:** This bill is enrolled and presented to the Governor on June 21.

#### **AB 245 (Chiu) – Student Records: Name and Gender Changes**

This bill requires the CCC, the CSU, and requests the UC, to reissue specified documents if a former student provides documentation that their legal name or gender has been changed. Additionally, commencing with the 2023-2024 graduating class, the bill requires the segments to provide an option to allow a graduating student to change the name on their diploma without legal documentation.

- **CSU Position:** Neutral
- **Status:** This bill is set for hearing in the Senate Judiciary Committee on June 29.

#### **AB 251 (Choi) – Admission by Exception**

This bill prohibits a senior campus administrator who is associated with campus development, external affairs, fundraising, donor relations, alumni relations or alumni outreach from approving a student's admission by exception.

- **CSU Position:** Neutral
- **Status:** This bill is awaiting a concurrence vote on the Assembly Floor.

#### **AB 320 (Medina) – Teacher Preparation Programs: Regionally Accredited Institutions**

This bill simplifies the process for qualified individuals seeking a teaching credential.

- **CSU Position:** Support
- **Status:** This bill is set for hearing in the Senate Appropriations Committee on July 5.



**AB 367 (Garcia, Cristina) – Menstrual Products**

This bill requires public postsecondary institutions to provide free menstrual products at no fewer than one central location on each campus. It also makes requirements for public schools that serve grades 6-12.

- **CSU Position:** Tracking
- **Status:** This bill is set for hearing in the Senate Appropriations Committee on July 5.

**AB 396 (Gabriel) – CalFresh: Educational Programs**

This bill requires the CSU and other educational institutions to apply to the Department of Social Services to certify that their educational programs increase employability and meet eligibility standards for CalFresh.

- **CSU Position:** Support
- **Status:** This bill is set for hearing in the Senate Education Committee on July 7.

**AB 498 (Quirk-Silva) – Computer Science Access Initiative**

This bill establishes the Computer Science Access Initiative, which will award grants to local educational agencies (K-12) for the purpose of increasing the number of computer science teachers.

- **CSU Position:** Support
- **Status:** This bill is awaiting hearing in the Senate Education Committee.

**AB 543 (Davies) – Student Orientation: CalFresh**

This bill requires the CSU, and requests the UC, to provide educational information about CalFresh and the eligibility requirements to all incoming students during orientation.

- **CSU Position:** Neutral
- **Status:** This bill is set for hearing in the Senate Appropriations Committee on July 5.

**AB 815 (Rivas, Luz) – School Nurses: Credentialing**

This bill authorizes the Commission on Teacher Credentialing to approve local education agencies (K-12) to offer school nurse credentialing programs.

- **CSU Position:** Oppose
- **Status:** This bill is set for hearing in the Senate Education Committee on June 30.

**AB 914 (Weber, Akilah) – CSU: Proficiency Level of Entering Students**

This bill updates and adds reporting requirements on student placement in general education courses and shifts the current annual reporting deadline from February 1 to April 1.

- **CSU Position:** Neutral
- **Status:** This bill is set for hearing in the Senate Appropriations Committee on July 5.

**AB 927 (Medina) – Community Colleges: Statewide Baccalaureate Degree Pilot Program**

This bill removes the sunset date on the statewide CCC baccalaureate degree pilot program and allows up to 30 programs to be approved each year. It maintains the current prohibition on CCC baccalaureate degrees that duplicate CSU and UC programs, and provides a structured consultation process on new programs between the CSU, the UC and the CCC Chancellor's Office.

- **CSU Position:** Neutral
- **Status:** This bill is set for hearing in the Senate Education Committee on July 14.

**AB 928 (Berman) – Student Transfer Achievement Reform Act of 2021: Associate Degree for Transfer Intersegmental Implementation Committee**

This bill creates an intersegmental committee on the Associate Degree for Transfer (ADT), consolidates the CSU and the UC general education pathways into one pathway, and requires that CCC students automatically enroll in an ADT pathway if they express a goal to transfer.

- **CSU Position:** Pending
- **Status:** This bill is set for hearing in the Senate Education Committee on July 14.

**AB 1002 (Choi) – Course Credit for Prior Military Education, Training, and Service**

This bill requires the CSU, and requests the UC, in collaboration with their respective academic senates, to develop a consistent policy to award course credit to military personnel and veterans who have an official Joint Services Transcript.

- **CSU Position:** Tracking
- **Status:** This bill is set for hearing in the Senate Military and Veterans Affairs Committee on June 30.

**AB 1111 (Berman) – Common Course Numbering System**

This bill requires the CCC Chancellor's Office to adopt a common-course numbering system.

- **CSU Position:** Tracking
- **Status:** This bill is awaiting hearing in the Senate Education Committee.

**AB 1113 (Medina) – Exemption from Tuition and Fees: Qualifying Survivors of Persons Providing Medical or Emergency Services Deceased During COVID-19 California State of Emergency**

This bill requires the CCC and the CSU, and requests the UC, to not collect systemwide tuition and mandatory campus-based fees from any qualifying spouse or child of a California licensed physician, nurse or first responder who died of COVID-19 during the pandemic state of emergency in California.

- **CSU Position:** Tracking
- **Status:** This bill is set for hearing in the Senate Education Committee on June 30.

**AB 1185 (Cervantes) – Student Financial Aid: Cal Grant Program**

This bill extends the Cal Grant eligibility requirements related to time out of high school and community college as well as age of the recipient until July 1, 2023, in response to the COVID-19 state of emergency.

- **CSU Position:** Support
- **Status:** This bill is set for hearing in the Senate Education Committee on June 30.

**AB 1306 (Arambula) – Health Professions Careers Opportunity Program**

This bill authorizes the Office of Statewide Health Planning and Development to fund 20 Health Professions Career Opportunity Program pilot programs at campuses, including five at CSU.

- **CSU Position:** Pending
- **Status:** This bill is set for hearing in the Senate Health Committee on July 7.

**AB 1326 (Arambula) – Public Social Services: County Liaison for Higher Education**

This bill requires a county human services agency to designate at least one employee as a staff liaison to serve as a point of contact for academic counselors and other professional staff at public higher education institutions within the county and to develop protocols for engagement.

- **CSU Position:** Support
- **Status:** This bill is set for hearing in the Senate Human Services Committee on July 6.

**AB 1377 (McCarty) – Student Housing: California Student Housing Revolving Loan Fund Act of 2021: Community College Student Housing**

This bill appropriates an unspecified amount of funds to the California School Finance Authority to provide loans to the CCC, the CSU and the UC for the purpose of building affordable student housing.

- **CSU Position:** Tracking
- **Status:** This bill is awaiting hearing in the Senate Education Committee.

**AB 1407 (Burke) – Nurses: Implicit Bias Courses**

This bill requires schools of nursing to include implicit bias training and specifies other requirements for a licensee when they renew their license.

- **CSU Position:** Neutral
- **Status:** This bill is set for hearing in the Senate Business, Professions and Economic Development Committee on June 30.

**AB 1456 (Medina) – Student Financial Aid: Cal Grant Reform Act**

This bill enacts the Cal Grant Reform Act, which revises the current structure and eligibility requirements of the state financial aid program.

- **CSU Position:** Support if amended
- **Status:** This bill is set for hearing in the Senate Education Committee on July 14.

**HR 53 (Levine) – CSU Class of 4 Million**

This resolution resolves that the Assembly joins in celebration of the Class of 4 Million at the CSU, its global network and its essential impact on California.

- **CSU Position:** Support
- **Status:** This bill is awaiting referral in the Assembly Rules Committee.

**BILLS NO LONGER ADVANCING**

**Senate Bills**

**SB 45 (Portantino) – Wildfire Prevention, Safe Drinking Water, Drought Preparation, and Flood Protection Bond Act of 2022**

This bill authorizes a \$5.6 billion bond to be placed on the November 2022 ballot to finance programs related to wildfire and water issues. It includes \$60 million to the CSU for fire research.

- **CSU Position:** Tracking
- **Status:** This bill is on the Senate Inactive File.

**SB 228 (Leyva) – Support Services for Foster Youth: Cooperating Agencies Foster Youth Educational Support Program**

This bill changes the requirement for priority enrollment of foster youth and former foster youth to those whose dependency was established on or after an individual's 13<sup>th</sup> birthday. Note: The contents of SB 228 were amended into SB 512 which is found on page 3 of the agenda.

- **CSU Position:** Support
- **Status:** This bill is on the Senate Inactive File.

**SB 387 (Portantino) – Peace Officers: Certification, Education and Recruitment**

This bill requires the Commission on Peace Officer Standards and Training to work with stakeholders in law enforcement, CCC, the CSU, the UC and community organizations to develop a list of courses to include as requirements for obtaining a basic peace officer certificate.

- **CSU Position:** Tracking
- **Status:** This bill is on the Senate Inactive File.

**SB 566 (Leyva) – CSU: Support Staff Employees: Merit Salary Adjustments**

This bill requires the CSU to use existing resources to provide a five-percent annual step in salary to each support staff employee and incorporate similar language into collective bargaining agreements, and sunsets this provision on July 1, 2032.

- **CSU Position:** Oppose
- **Status:** This bill was held on the Senate Appropriations Committee Suspense File.

**SB 747 (Hurtado) – Central Valley Medical School Endowment Fund**

This bill creates the Central Valley Medical School Endowment Fund to support a CSU medical school in the central valley.

- **CSU Position:** Tracking
- **Status:** This bill is in the Senate Rules Committee awaiting referral.

**SB 785 (Glazer) – California Promise Program: CSU Students**

This bill requires, commencing with the 2022-2023 academic year, that at least five percent of each incoming class at each participating campus of the CSU be a participant in the California Promise program, and that at least 70 percent of those participating students be either low-income, first-generation or from communities that are underrepresented in higher education.

- **CSU Position:** Pending
- **Status:** This bill is on the Senate Inactive File.

**SB 787 (Hurtado) – CSU Program in Medical Education**

This bill requires the CSU to establish Doctor of Medicine degree programs.

- **CSU Position:** Tracking
- **Status:** This bill is in the Senate Rules Committee awaiting referral.

### **Assembly Bills**

#### **AB 29 (Cooper) – State Bodies: Meetings**

This bill amends the Bagley-Keene Open Meetings Act to require that all materials and writings provided to board members of a state agency, board or commission be posted on the website the same day the materials are given to board members or at least 72 hours in advance of the meeting, whichever is earlier. The bill prohibits distribution, discussion or action on writings or materials that do not meet this posting requirement.

- **CSU Position:** Pending
- **Status:** This bill was held on the Assembly Appropriations Committee Suspense File.

#### **AB 53 (Low) – Election Day Holiday**

This bill creates a state holiday for the general election in even numbered years, and requires state offices, public schools and public postsecondary campuses, including the CSU, to be closed.

- **CSU Position:** Tracking
- **Status:** This bill was held on the Assembly Appropriations Committee Suspense File.

#### **AB 288 (Bonta) – California Ban on Scholarship Displacement Act of 2021**

This bill prohibits public and private higher education institutions from reducing certain students' institution-based financial aid awards below their financial need.

- **CSU Position:** Pending
- **Status:** This bill is on the Assembly Appropriations Committee Suspense File.

#### **AB 295 (Jones-Sawyer) – Pilot Program for Free Tuition and Fees: Working Group**

This bill establishes a working group with representatives from the Department of Education, Board of Governors of the CCC, Trustees of the CSU and Regents of the UC to consider the creation of a pilot program that provides free postsecondary education.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.

#### **AB 403 (Kalra) – Fair Access to College Textbooks Act**

This bill places restrictions on postsecondary educational institutions to assess automatic charges (commonly known as “opt-out” programs) and bulk access programs for instructional materials.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.

**AB 524 (Rodriguez) – Campus-Affiliated Sorority and Fraternity Transparency Act**

The bill requires higher education institutions to annually collect information from each sorority and fraternity and post it online.

- **CSU Position:** Pending
- **Status:** This bill is on the Assembly Inactive File.

**AB 595 (Medina) – CSU and UC: Student Eligibility Policy**

This bill requires the Trustees of the CSU, and requests the Regents of the UC, to engage in a specified process when adding requirements to undergraduate admissions. The process includes public meetings, the commissioning of an independent study and presenting the study and policy change to the relevant policy committees no less than 60 days prior to the scheduled vote on the admissions change.

- **CSU Position:** Pending
- **Status:** This bill is on the Assembly Appropriations Committee Suspense File.

**AB 609 (Kamlager) – College Athlete Race and Gender Equity Act**

This bill requires that specified sports provide a royalty fee to student athletes, suspends the athletic director for three years for Title IX violations, reduces athletic administrative personnel compensation by 50 percent and prohibits building new athletic facilities for ten years except for health and safety reasons.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.

**AB 737 (Santiago) – CSU: Tuition**

This bill prohibits the CSU from charging tuition or mandatory systemwide fees for enrollment for any academic year, for up to two academic years, to a CCC resident transfer student who completed an associate degree, has received a fee waiver under the California College Promise and is at least 28 years of age.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.

**AB 1097 (Santiago) – Student Financial Aid: Cal Grants: Fraud, Abuse and False Advertising**

This bill expands Cal Grant eligibility to California residents attending a branch of a public postsecondary educational institution established by a jurisdiction other than California and that is located within the state.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.

**AB 1115 (Choi) – Community Colleges: Statewide Baccalaureate Degree Pilot Program**

This bill extends the sunset date for the existing CCC baccalaureate degree pilot program by one year to July 2027.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.

**AB 1176 (Garcia, Eduardo) – Communications: Universal Broadband Service: California Connect Fund**

This bill creates the California Connect Program to increase access to high-speed broadband service and subsidize households that meet certain requirements. The bill tasks the Public Utilities Commission with developing and implementing the program, with eligibility criteria that includes a low-income qualification and a student qualification.

- **CSU Position:** Pending
- **Status:** This bill was held on the Assembly Appropriations Committee Suspense File.

**AB 1421 (Nguyen) – Refunds of Student Campus Fees**

This bill requires the CCC and the CSU, and requests the UC, to identify students who were obliged to stay away from their respective campuses due to the COVID-19 pandemic during the 2019-2020 and 2020-2021 academic years and ascertain the amounts of campus fees collected from each of these students. The bill appropriates this unknown amount from the General Fund to be refunded to those students through their respective institutions.

- **CSU Position:** Tracking
- **Status:** This bill failed to meet committee deadlines and has become a two-year bill.



**AB 1467 (Cervantes) – Student Safety: Sexual Assault Procedures and Protocols: Sexual Assault Counselors**

This bill requires procedures related to the hiring of campus sexual assault counselors and the annual review of executive orders related to Title IX.

- **CSU Position:** Pending
- **Status:** This bill is on the Assembly Appropriations Committee Suspense File.

## **AGENDA**

### **COMMITTEE ON UNIVERSITY AND FACULTY PERSONNEL**

**Meeting:**     **3:15 p.m., Tuesday, July 13, 2021**  
**Virtually via Teleconference**

Wenda Fong, Chair  
Jean P. Firstenberg, Vice Chair  
Jack Clarke, Jr.  
Douglas Faigin  
Debra S. Farar  
Christopher Steinhauser

**Consent**       1. Approval of Minutes of the Meeting of May 19, 2021, *Action*

**Discussion**   2. Executive Compensation: Executive Vice Chancellor for Academic and Student Affairs –  
California State University, *Action*

**MINUTES OF THE MEETING OF  
COMMITTEE ON UNIVERSITY AND FACULTY PERSONNEL**

**Trustees of the California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 19, 2021**

**Members Present**

Silas H. Abrego, Chair  
Debra S. Farar, Vice Chair  
Adam Day  
Jean P. Firstenberg  
Wenda Fong  
Christopher Steinhauser

Lillian Kimbell, Chair of the Board  
Joseph I. Castro, Chancellor

**Public Speakers**

Due to the virtual format of the May 19, 2021 meeting, all public comment took place prior to the committee meeting's open session.

Trustee Abrego called the meeting to order.

**Approval of Minutes**

The minutes of the March 23, 2021 meeting were approved as submitted.

**Executive Compensation: President – California State University, Fresno**

Trustee Abrego introduced Chancellor Joseph Castro to present agenda item 2, compensation for the president of California State University, Fresno.

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the May 17-19, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**

Chancellor Castro congratulated Dr. Saúl Jiménez-Sandoval on his appointment as president of California State University, Fresno. Dr. Jiménez-Sandoval has served Fresno State for more than 20 years as a campus leader, including professor, provost, and most recently, interim president. His appointment as president in a permanent capacity is effective May 19, 2021.

Chancellor Castro recommended compensation for Dr. Jiménez-Sandoval as published in the amended item. Dr. Jiménez-Sandoval receives an annual salary of \$348,423 as interim president and there will be no change to his compensation as president. He will receive a \$1,000 monthly auto allowance and other benefits as cited in the amended item. Additionally, Dr. Jiménez-Sandoval will be required to reside in the university's presidential residence.

A roll call vote was taken, and the committee unanimously recommended approval of the proposed resolution. (RUF 05-21-04)

Trustee Abrego adjourned the committee meeting.

**COMMITTEE ON UNIVERSITY AND FACULTY PERSONNEL**

**Executive Compensation: Executive Vice Chancellor for Academic and Student Affairs –  
California State University**

**Presentation By**

Joseph I. Castro  
Chancellor

**Summary**

This action item establishes the compensation for Dr. Sylvia A. Alva as executive vice chancellor for academic and student affairs of the California State University.

**Executive Compensation**

This item recommends that Dr. Sylvia A. Alva receive an annual salary of \$361,242 effective on August 2, 2021, the date of her appointment as executive vice chancellor for academic and student affairs of the California State University. (This is the same salary as the previous incumbent.) Additionally, Dr. Alva will receive a temporary housing allowance of \$5,000 per month for twelve months.

In accordance with existing policy of the California State University, Dr. Alva will receive the following benefits:

- An auto allowance of \$1,000 per month;
- Standard benefit provisions afforded CSU Executive classification employees;
- An executive transition program provided eligibility requirements are met as stated in the Executive Transition II program passed by the Board of Trustees on November 15, 2006 (RUF 11-06-06); and
- Reimbursement for actual, necessary and reasonable travel and relocation expenses.

Dr. Alva will retain her academic rank of full professor with tenure, subject to faculty consultation, in the College of Letter, Arts, and Social Sciences, Department of Psychology, at California State Polytechnic University, Pomona.

**AMENDED**

U&FP

Agenda Item 2

July 13-14, 2021

Page 2 of 2

**Recommended Action**

The following resolution is recommended for adoption:

**RESOLVED**, by the Board of Trustees of the California State University, that Dr. Sylvia A. Alva shall receive a salary set at the annual rate of \$361,242 effective on August 2, 2021, the date of her appointment as executive vice chancellor for academic and student affairs of the California State University; and be it further

**RESOLVED**, Dr. Alva shall receive a temporary housing allowance and additional benefits as cited in Agenda Item 2 of the Committee on University and Faculty Personnel at the July 13-14, 2021 meeting of the Board of Trustees.

## AGENDA

### COMMITTEE OF THE WHOLE

**Meeting:** 3:30 p.m., Tuesday, July 13, 2021  
Virtually via Teleconference

Lillian Kimbell, Chair  
Wenda Fong, Vice Chair  
Larry L. Adamson  
Diego Arambula  
Jane W. Carney  
Jack Clarke, Jr.  
Adam Day  
Douglas Faigin  
Debra S. Farar  
Jean P. Firstenberg  
Maryana Khames  
Jack McGrory  
Anna Ortiz-Morfit  
Krystal Raynes  
Romey Sabalius  
Lateefah Simon  
Christopher Steinhauser  
Joseph I. Castro, Chancellor

**Consent** 1. Approval of Minutes of the Meeting of May 19, 2021, *Action*  
**Discussion** 2. Conferral of Title of Student Trustee Emerita—Maryana Khames, *Action*

**MINUTES OF THE MEETING OF  
COMMITTEE OF THE WHOLE**

**Trustees of The California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 19, 2021**

**Members Present**

Lillian Kimbell, Chair  
Wenda Fong, Vice Chair  
Silas H. Abrego  
Larry L. Adamson  
Diego Arambula  
Jane W. Carney  
Jack Clarke. Jr.  
Adam Day  
Douglas Faigin  
Debra S. Farar  
Jean P. Firstenberg  
Maryana Khames  
Jack McGrory  
Anna Ortiz-Morfit  
Krystal Raynes  
Romey Sabalius  
Christopher Steinhauser  
Peter J. Taylor  
Joseph I. Castro, Chancellor

Chair Kimbell called the meeting to order.

**Consent Agenda**

Chair Kimbell presented the consent agenda for approval. The consent agenda consisted of the minutes of the March 23, 2021 meeting. There was a motion and a second. The consent agenda was approved.

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the May 17-19, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**



## **Discussion Agenda**

### **Conferral of Commendation—Karen Nakai**

Chair Kimbell presented the action item commending Karen Nakai, Chief of Staff to the Chancellor, for her many decades of exemplary service, commitment and leadership to the CSU and public education in California. The resolution (RCOW 05-21-04) was approved unanimously by a roll call vote.

### **Conferral of Title of Trustee Emeritus—Silas H. Abrego**

Chair Kimbell presented the action item conferring the title of Trustee Emeritus on Silas H. Abrego in recognition of his many years of exemplary service, unwavering commitment and visionary leadership to the CSU. The resolution (RCOW 05-21-05) was approved unanimously by a roll call vote.

### **Conferral of Title of Trustee Emeritus—Peter J. Taylor**

Chair Kimbell presented the action item conferring the title of Trustee Emeritus on Peter J. Taylor in recognition of his exemplary service, unwavering commitment and visionary leadership to the CSU. The resolution (RCOW 05-21-06) was approved unanimously by a roll call vote.

Chair Kimbell adjourned the meeting of the Committee of the Whole.

**COMMITTEE OF THE WHOLE**

**Conferral of Title of Student Trustee Emerita–Maryana Khames**

**Presentation By**

Lillian Kimbell  
Chair of the Board

**Summary**

It is recommended that Student Trustee Maryana Khames, whose term expired on June 30, 2021, be conferred the title of Student Trustee Emerita for her service, commitment and leadership to the California State University. The granting of emerita status carries the title, but no compensation.

The following resolution is recommended for approval:

**RESOLVED**, by the Board of Trustees of the California State University, that this board confers the title of Student Trustee Emerita on Maryana Khames, with all the rights and privileges thereto.

# TRUSTEES OF THE CALIFORNIA STATE UNIVERSITY

California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, CA 90802

July 14, 2021

*Presiding: Lillian Kimbell, Chair*

9:00 a.m. Board of Trustees

Virtually via Teleconference

Call to Order

Roll Call

Chair's Report

Chancellor's Report

Academic Senate CSU Report: *Chair—Robert Keith Collins*

California State Student Association Report: *President—Isaac Alferos*

California State University Alumni Council Report: *President—Jeremy Addis-Mills*

Consent

- Action* 1. Approval of the Minutes of the Board of Trustees Meeting of May 19, 2021  
*Action* 2. Approval of Committee Resolutions as follows:

## **Committee on Educational Policy**

2. Commission on the Extended University

## **Committee on Institutional Advancement**

2. Naming of The KPBS Conrad Prebys Media Complex – San Diego State University
3. Naming of Prebys Stage – San Diego State University
4. Naming of the CSU Shiley Haynes Institute for Palliative Care

## **Committee on University and Faculty Personnel**

2. Executive Compensation: Executive Vice Chancellor for Academic and Student Affairs – California State University

## **Committee of the Whole**

2. Conferral of Title of Student Trustee Emerita—Maryana Khames

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Order N-25-20 issued on March 12, 2020, some or all of the members of the Board of Trustees may participate in this meeting remotely, either by telephonic or video conference means. The Dumke Auditorium shall nonetheless be open and available for members of the public to attend, observe the proceedings of the meeting (including the audio/video transmissions of trustees participating from remote locations), and offer public comment pursuant to the published protocol for "Addressing the Board of Trustees."**

**\*\*The Board of Trustees is a public body, and members of the public have a right to attend and participate in its meetings. This schedule of meetings is established as a best approximation of how long each scheduled meeting will take to complete its business. Each meeting will be taken in sequence, except in unusual circumstances. Depending on the length of the discussions, which are not possible to predict with precision in advance, the scheduled meeting times indicated may vary widely. For two-day meetings, items scheduled for one day may be heard either the day before or the day after depending upon the time spent on each matter. The public is advised to take this uncertainty into account in planning to attend any meeting listed on this schedule.**

**MINUTES OF THE MEETING OF BOARD OF TRUSTEES**

**Trustees of the California State University  
Office of the Chancellor  
Glenn S. Dumke Auditorium\*  
401 Golden Shore  
Long Beach, California**

**May 19, 2021**

**Trustees Present**

Lillian Kimbell, Chair  
Wenda Fong, Vice Chair  
Silas H. Abrego  
Larry L. Adamson  
Diego Arambula  
Jane W. Carney  
Jack Clarke, Jr.  
Adam Day  
Douglas Faigin  
Debra S. Farar  
Jean P. Firstenberg  
Maryana Khames  
Jack McGrory  
Anna Ortiz-Morfit  
Krystal Raynes  
Romey Sabalius  
Christopher Steinhauser  
Peter J. Taylor  
Joseph I. Castro, Chancellor  
Lieutenant Governor Eleni Kounalakis

Chair Lillian Kimbell called the meeting of the Board of Trustees to order.

**\*PLEASE NOTE: Due to the Governor's proclamation of a State of Emergency resulting from the threat of COVID-19, and pursuant to the Governor's Executive Orders N-25-20 and N-29-20 issued on March 12, 2020 and March 17, 2020, respectively, all members of the Board of Trustees may participate in meetings remotely, either by telephonic or video conference means. Out of consideration for the health, safety and well-being of the members of the public and the Chancellor's Office staff, the May 17-19, 2021 meeting of the CSU Board of Trustees was conducted entirely virtually via Zoom teleconference.**

BoT  
Agenda Item 1  
July 13-14, 2021

## **Public Comment**

Due to the virtual format of the May 17-19, 2021 meeting, all public comment took place at the beginning of the meeting's open session prior to all committees. For the purposes of public record, the board heard from the following individuals during the revised public comment period:

Justin Tang, Teaching Associate/Graduate Assistant, SDSU; Karl Zieber, UAW 4123; Amanda Daly, Teaching Associate, UAW 4123; Maya Bornstein, Teaching Associate, UAW 4123; Oliver Tripp, VP District 1, UAW 4123; Christopher Pascua, UAW 4123; Noah Weisel, UAW 4123; Alexandra Carrillo, UAW 4123; Elizabeth Hannigan, UAW 4123; Peter Uhl, UAW 4123; Isabel Zecua, Instructional Student Assistant, UAW 4123; Amanda Hernandez, Instructional Student Assistant, UAW 4123; William Medwid, Instructional Student Assistant, UAW 4123; Joseph McGuire, UAW 4123; Nathan Romine, Instructional Student Assistant, UAW 4123; Rebekah Paerels, Instructional Student Assistant, UAW 4123; Jess Hotaling, UAW 4123; Brandie White, Cell/Molecular Bio PhD candidate, UAW 4123; Lark Winner, Unit 11 Employee, UAW 4123; Robert Hogg, Teaching Associate and Graduate Assistant, UAW 4123; Drew Scott, Teamsters; Caitlin MacGregor, Teaching Assistant, CSU Northridge; Don Moreno, Custodian, CSUEU; Megan Ruggiero; Robert Echols, Professor, Cal Poly SLO; Diane Blair, Professor, CFA; Michelle Ramos Pellicia, Associate Professor, CFA; Meghan O'Donnell, AVP Lecturers North, CFA; Lisa Swartz, Cal Poly SLO; Ethan Quaranta, Organizer/Incoming Co-Chair, Divest the CSU; Mounica Kota, SLO; Manmit Singh Chahal, Cal Poly SLO; Aswini Melekote, Babson; Rachita Upadhya, Cal State East Bay; Jack Hebner, Instructional Student Assistant, CSU Channel Islands; Gennie Kieffer, Community Member; Sharon Elise, AVP for Racial and Social Justice South And professor of Sociology, CFA; Carlos Davidson, Professor emeritus, San Francisco State University; Julianna Gutierrez, Students for Quality Education; Melys Bonifacio-Jerez, Students for Quality Education; Alexander Smith, Students for Quality Education; Vanessa Monroy, Students for Quality Education; Ruben Ramos, Student, CSU Northridge, Students for Quality Education; Toyo Akinremi, Student, CSU San Bernardino, Students for Quality Education; Edie (Edee) Brown, President, Academic Professionals of California; Dagoberto Argueta, Vice President, Academic Professionals of California; Saira Kanwal, Poetic Justice Foundation; Tanya Acosta, Student, Fresno; Dawn McCulley, CSUEU; Rich McGee, CSUEU; Randall Santiago, Student, CSU Long Beach; Sasha Perez, Public Affairs Manager, Campaign for College Opportunity; Kevin Wehr, Vice President, CFA; Jessica Westbay, Vice President for Representation, CSUEU; Tony Spraggins, Chair, Bargaining Unit 7, CSUEU; Tessy Reese, Chair, Bargaining Unit 2, CSUEU; and Matt Mason.

## **Chair's Report**

Chair Kimbell's report is available online at the following link:

<https://www2.calstate.edu/csu-system/board-of-trustees/reports-of-the-chair/Pages/may-2021.aspx>

### **Chancellor's Report**

Chancellor Joseph I. Castro's report is available online at the following link:  
<https://www2.calstate.edu/csu-system/board-of-trustees/chancellor-reports/Pages/may-19-2021.aspx>

### **Report of the Academic Senate CSU**

CSU Academic Senate Chair Robert Keith Collins's report is available online at the following link:  
<https://www2.calstate.edu/csu-system/faculty-staff/academic-senate/Pages/ASCSU-Chairs-Report.aspx>

### **Report from the California State Student Association**

CSSA President Zahraa Khuraibet's report is available online at the following link:  
<https://www.calstatestudents.org/public-documents/#president>

### **Report of the California State University Alumni Council**

Alumni Council President Michelle Power's report is available online at the following link:  
<https://www2.calstate.edu/impact-of-the-csu/alumni/council/board-of-trustee-reports/Pages/default.aspx>

### **Board of Trustees**

The minutes of the meeting of March 23, 2021 were unanimously approved as submitted.

Chair Kimbell asked to move all the consent agenda items for approval. There was a motion and a second. Chair Kimbell called for a roll call vote and the Board of Trustees unanimously approved the following resolutions:

### **COMMITTEE ON COMMITTEES**

#### **Approval of Board of Trustees' Standing Committee Assignments for 2021-2022 (RCOC 05-21-01)**

**RESOLVED**, by the Board of Trustees of The California State University, on recommendation by the Committee on Committees that the following appointments be made to the Standing Committees for 2021-2022 to take effect immediately following the conclusion of the May 17-19, 2021 board meeting.

BoT  
Agenda Item 1  
July 13-14, 2021

**AUDIT**

Adam Day, Chair  
Jane W. Carney, Vice Chair  
Jack McGrory  
Anna Ortiz-Morfit  
Krystal Raynes  
Lateefah Simon

**CAMPUS PLANNING,  
BUILDINGS AND GROUNDS**

Jane W. Carney, Chair  
Wenda Fong, Vice Chair  
Larry L. Adamson  
Adam Day  
Anna Ortiz-Morfit  
Romey Sabalius

**COLLECTIVE BARGAINING**

Debra S. Farar, Chair  
Lateefah Simon, Vice Chair  
Adam Day  
Douglas Faigin  
Jack McGrory  
Christopher Steinhauser

**EDUCATIONAL POLICY**

Christopher Steinhauser, Chair  
Romey Sabalius, Vice Chair  
Larry L. Adamson  
Diego Arambula  
Jane W. Carney  
Jack Clarke, Jr.  
Douglas Faigin  
Jean P. Firstenberg  
Wenda Fong  
Krystal Raynes

**FINANCE**

Jack McGrory, Chair  
Larry L. Adamson, Vice Chair  
Jane W. Carney  
Wenda Fong  
Anna Ortiz-Morfit  
Krystal Raynes  
Romey Sabalius  
Christopher Steinhauser

**GOVERNMENTAL RELATIONS**

Douglas Faigin, Chair  
Krystal Raynes, Vice Chair  
Diego Arambula  
Jack Clarke, Jr.  
Jean P. Firstenberg  
Jack McGrory  
Romey Sabalius  
Lateefah Simon

**INSTITUTIONAL ADVANCEMENT**

Jean P. Firstenberg, Chair  
Douglas Faigin, Vice Chair  
Diego Arambula  
Debra S. Farar  
Anna Ortiz-Morfit  
Christopher Steinhauser

**ORGANIZATION AND RULES**

Larry L. Adamson, Chair  
Debra S. Farar, Vice Chair  
Diego Arambula  
Jack Clarke, Jr.  
Adam Day  
Lateefah Simon

**UNIVERSITY AND FACULTY  
PERSONNEL**

Wenda Fong, Chair  
Jean P. Firstenberg, Vice Chair  
Jack Clarke, Jr.  
Douglas Faigin  
Debra S. Farar  
Christopher Steinhauser

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**Election of the Chair and Vice Chair of the Board of Trustees for 2021-2022  
(RCOC 05-21-02)**

**RESOLVED**, by the Board of Trustees of The California State University, on recommendation by the Committee on Committees, that Lillian Kimbell be elected chair for 2021-2022 to take effect immediately following the conclusion of the May 17-19, 2021 board meeting.

**RESOLVED**, by the Board of Trustees of The California State University, on recommendation by the Committee on Committees, that Wenda Fong be elected vice chair for 2021-2022 to take effect immediately following the conclusion of the May 17-19, 2021 board meeting.

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**COMMITTEE ON FINANCE**

**California State University, Monterey Bay Conceptual Approval of a Public-Private Partnership Mixed-Use Development Project  
(RFIN 05-21-02)**

**RESOLVED**, by the Board of Trustees of the California State University, that the Trustees:

1. Approve the concept of a public/private partnership for a mixed-use development and the release of the Request for Proposals;
2. Authorize the chancellor and the campus to enter into negotiations for agreements as necessary to develop a final plan for the public/private partnership as explained in Agenda Item 2 of the May 17-19, 2021 meeting on the Committee on Finance;



3. Authorize the chancellor and the campus to enter into a due diligence access and option agreement which provides the developer with a limited-term option along with the responsibility for the development of a final plan, schematic drawings, and necessary environmental analyses during the option period;
4. Will consider the following additional action items relating to the final plan:
  - a) Certification of Final California Environmental Quality Act (CEQA) documentation.
  - b) Approval of a development and financial plan negotiated by the campus and the developer with the advice of the Chancellor;
  - c) Approval of an amendment to the Non-State Capital Outlay Program;
  - d) Approval of the schematic design.

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## COMMITTEE ON UNIVERSITY AND FACULTY PERSONNEL

### **Executive Compensation: President–California State University, Fresno (RUF 05-21-04)**

**RESOLVED**, by the Board of Trustees of the California State University, that Dr. Saúl Jiménez-Sandoval shall receive a salary set at the annual rate of \$348,423 effective on May 19, 2021, the date of his appointment as president of California State University, Fresno; and be it further

**RESOLVED**, Dr. Jiménez-Sandoval shall occupy the official presidential residence located in Fresno, California, as a condition of his employment as president; and be it further

**RESOLVED**, Dr. Jiménez-Sandoval shall receive additional benefits as cited in Agenda Item 2 of the Committee on University and Faculty Personnel at the May 19, 2021 meeting of the Board of Trustees.

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**COMMITTEE OF THE WHOLE**

**Conferral of Commendation–Karen Nakai  
(RCOW 05-21-04)**

**RESOLVED**, by the Board of Trustees of the California State University, that this board commends Karen Nakai for her steadfast dedication and leadership on behalf of the students, faculty, staff, administrators, alumni and friends of the California State University.

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**Conferral of Title of Trustee Emeritus–Silas H. Abrego  
(RCOW 05-21-05)**

**RESOLVED**, by the Board of Trustees of the California State University, that this board confers the title of Trustee Emeritus on Silas H. Abrego, with all the rights and privileges thereto.

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**Conferral of Title of Trustee Emeritus–Peter J. Taylor  
(RCOW 05-21-06)**

**RESOLVED**, by the Board of Trustees of the California State University, that this board confers the title of Trustee Emeritus on Peter J. Taylor, with all the rights and privileges thereto.