

UNIVERSITY OF CALIFORNIA, OFFICE OF THE
PRESIDENT
REQUEST FOR QUOTATION

ISSUE DATE: January 10, 2006
RFP NO: UCOP-PRIVATE_LOANS-2006
DUE DATE: January 25, 2006
TIME: 3:00 p.m.

Proposals must be received by the due date and time to be considered.

If further information is required, please contact: **Evan Fixler @ (310) 794-2913**
Email: efixler@finance.ucla.edu

This document can only be issued by a University of California authorized Purchasing Agent

Please quote your most favorable pricing for your proposed solution in response to this formal solicitation. Any deviation from the specifications must be identified and fully described. No costs over and above the prices proposed in response to this RFP will be considered. The University reserves the right to accept or reject proposals on each item separately, or as a whole, and to waive any irregularities in a proposal.

THIS IS NOT AN ORDER

All qualified, interested suppliers are invited to submit quotations for:

**PRIVATE LOANS FOR
UNIVERSITY OF CALIFORNIA STUDENTS**

For the

University of California, Office of the President
Student Financial Support

REQUEST FOR QUOTATION FOR PRIVATE LOANS FOR UNIVERSITY OF CALIFORNIA STUDENTS

INTRODUCTION

Overview

The Regents of the University of California (University) is issuing this Request for Quotation for Private Loans for University of California Students (RFQ) to solicit Quotations from qualified student loan lenders (Bidders) for a suite of privately financed student loan products for University of California (UC) students within a specified Discipline or Group (refer to Attachment A: Disciplines and Groups). The responsive Bidder(s), as determined by this RFQ and with whom the University successfully negotiates an Agreement, will be referred to in this RFQ as a “Preferred Private Loan Lender(s).”

For purposes of this RFQ, the term “privately financed” is defined as a loan 1) from a non-University source or a non-federal loan program; 2) owed to an entity other than the University; 3) for which the University assumes no loan origination, loan servicing, or loan collection responsibilities; 4) for which the University assumes no financial responsibility or risk, including, but not limited to, borrower default or improper loan servicing; and 5) for which the University does not provide one-time or ongoing funding to the Preferred Private Loan Lender(s).

It is the University’s intent to ensure that all students, beginning with those enrolled in degree programs in 2006-07 at a UC campus and for whom the campus will certify their eligibility (Eligible Student), have easy and immediate access to the best possible student loan terms to finance their UC education. An Eligible Student includes, but is not limited to, a student who is enrolled, as defined by the campus Registrar; is attending full, part, or less-than-half time; is not in default on any institutional or Title IV federal financial aid; or does not owe a refund on a federal student grant. (Refer to Attachment B: Student Eligibility Criteria.) Students who are not pursuing a degree and are enrolled exclusively in University Extension programs are not included in the definition of an Eligible Student.

Additionally, the University seeks “one-stop” shopping for all Eligible Students in need of privately financed loans. Thus, regardless of whether the student has “good” or “bad” credit, has a credit-worthy cosigner or no cosigner, or is an international student, i.e., not a U. S. citizen or permanent resident, it is expected that once the campus has certified the student’s eligibility and the loan amount (refer to Attachment C: Loan Limits), the Preferred Private Loan Lender will provide a loan product for that student; in other words, the Preferred Private Loan Lender shall not deny a private loan to any Eligible Student, regardless of his or her personal situation. Personal situations of Eligible Students span a wide spectrum and include those who may or may not have exceeded their federal student loan eligibility, are not eligible for federal loans, or did not apply for federal student loans (refer to Attachment D: Borrower Situations). These Eligible students can be

undergraduates or graduates pursuing a degree in an academic field (“graduate academic”), or enrolled in a professional degree program or in a self-supporting graduate degree program.

Bidders are invited to offer a Quotation for a suite of loans for one or more Disciplines or Groups. The suite of loans for a specified Discipline or Group must consist of four (4) loan products. Bidders are allowed through this RFQ to use a risk-based pricing structure; thus, each loan product can be priced commensurately with the risk level of the Eligible Student. However, the risk levels are defined in Attachment E: FICO Score Category, and the Preferred Private Loan Lender shall not utilize a different range of FICO scores both for Quotation and lending purposes.

For each Discipline or Group, the selection of the Preferred Private Loan Lender(s) will be based on the Quotation(s), offering the lowest Annual Percentage Rate (APR), as determined through the application of a University-developed formula.

It is anticipated that one (1) Preferred Private Loan Lender will be selected for each of the following Disciplines or Groups: Business, Law, and Health Professions; however, it is anticipated that two (2) Preferred Private Loan Lenders will be selected for the Group, titled “Other.” (Eligible Students within the “Other” Group may elect to apply for a loan from either Preferred Private Loan Lender). If a Bidder offers a Quotation for a suite of loans for more than one Discipline or Group, that Bidder could be selected as a Preferred Private Loan Lender for more than one Discipline or Group. It is anticipated that the fewest number of Preferred Private Loan Lenders that could be selected through this RFQ process for all Disciplines and Groups is two (2); the most is five (5).

The Preferred Private Loan Lender(s) shall not require an Eligible Student to secure a cosigner, unless the Eligible Student will be a minor at the time of signing the promissory note. However, if an Eligible Student, with a qualified cosigner, as defined by the Preferred Private Loan Lender, could qualify for better loan terms within the Preferred Private Loan Lender’s suite of loans, the Preferred Private Loan Lender shall advise the Eligible Student accordingly. If the Eligible Student does not obtain a qualified cosigner, the Preferred Private Loan Lender shall offer the Eligible Student the loan terms commensurate with his or her FICO credit score rating, pursuant to Attachment E: FICO Score Category and the Preferred Private Loan Lender’s Quotation.

The University does not commit to increasing loan volume in the Federal Family Education Loan (FFEL) Program as a result of this RFQ, and the University strongly discourages Bidders from linking incentives to increased FFEL volume.

Furthermore, the University does not guarantee a minimum amount of private loan volume to the Preferred Private Loan Lenders. However, as student reliance on private loans increases, the University expects that private loan volume will increase accordingly, and the Preferred Private Loan Lender(s) selected through this process are likely to realize some of the existing as well as new loan volume. Attachment F: Enrollment and Private Loan Data

reflects system-wide data from the University's Corporate Student System on the number of UC students and the volume of private loans they borrowed in 2004-05.

The campus office that serves the financial aid needs of the students in the respective Discipline or Group will make an effort to direct students who are in need of privately financed loans to the Preferred Private Loan Lender(s). This effort will take the form of either 1) listing only the name of the Preferred Private Loan Lender(s) or 2) highlighting and displaying at the top of any Private Loan list the name of the Preferred Private Loan Lender(s), if the name of other lenders not selected through this RFQ process are also listed.

It is important that Bidders understand that the University is not in a position to use the Preferred Private Loan Lenders exclusively for meeting the private loan needs of its students. For example if a continuing student previously borrowed from another lender and that student wants to continue to receive private loans from that lender, or if a new student independently selects a private loan lender who is not a Preferred Private Loan Lender, the University would be obligated to certify that student's loan eligibility and amount with the lender the student selects. Thus, this RFQ will not result in an exclusive relationship with the University in this regard.

About the University of California

Founded as California's first and only land grant institution in 1868, UC is a system of ten (10) campuses with more than 200,000 students. The official research arm of the State of California, UC has five medical schools, three law schools, and the nation's largest continuing education program.

Responsibilities of the Office of the President

The UC Office of the President (UCOP), in conjunction with the UCLA Purchasing Office, has assumed responsibility for managing the competitive RFQ process for these systemwide private loan products. The UCOP Student Financial Support Office will serve as the primary liaison between the University and the Preferred Private Loan Lenders regarding contractual and University policy matters and, to the extent needed, will serve in a coordinating role between the campuses and the Preferred Private Loan Lender(s).

Responsibilities of the Campuses

Each campus is different from one another in just about every aspect of the financial aid operation: different financial aid systems, different student accounts and disbursement systems, and different organizational structures. The Preferred Private Loan Lender(s) will be interfacing directly with each campus from an operational standpoint; therefore, that interface will vary campus by campus and, in some cases, campus office by campus office.

The central campus financial aid office typically handles the financial aid needs of the undergraduate and graduate academic students; however, many of the professional schools have their own financial aid personnel who work directly with their students who are in need of private loans. (Refer to Attachment H.) At some campuses, the interface with the private loan lenders may vary from office to office. Thus, if a Bidder is selected as the Preferred Private Loan Lender for more than one Discipline or Group, it is possible that the Preferred Private Loan Lender will have multiple contacts and, possibly, different system interfaces at a given campus.

Four of the campuses (Los Angeles, Merced, San Francisco, and San Diego) award Stafford Loans via Federal Family Education Loan Program lenders; the other campuses award Stafford Loans via the William D. Ford Direct Loan Program. In 2005-06, the Merced campus will be awarding financial aid to its first cohort of entering students. The number of entering undergraduates expected at UC Merced is 1,016; the number of undergraduate transfers, 150; and the number of graduate students, 35. Starting in 2006-07, enrollment is expected to grow annually at UC Merced.

The financial aid award year differs by campus as well, which has an impact on whether summer term awards are treated as “headers” or “trailers.” At the Los Angeles, Riverside, and San Francisco campuses, summer term awards are treated as headers; therefore, Summer 2006 awards would be considered part of the 2006-07 financial aid award year. At the Davis campus, there are headers and trailers, depending on the particular program in which the student is enrolled. For example, summer financial aid is treated as a header for the medical and veterinary medicine students whereas summer financial aid is treated as a trailer for undergraduates and graduate academic students. At all the other campuses, however, summer term awards are treated as trailers; therefore, Summer 2006 awards would be considered part of the 2005-06 financial aid award year.

All campus programs will certify the student’s loan eligibility, based on the eligibility criteria specified in Attachment B. In addition, the campus program will identify the Discipline or Group in which the student qualifies and certify the loan amount. Although a few campuses have only one financial aid office that handles the financial aid needs of all students, most campuses need to have students identified according to distinct groups to assist the campus in properly directing incoming documents and checks to the appropriate office. It should be noted that, at a few campuses, the distinct groups can be different than the four Disciplines and Groups defined under this RFQ. Refer to Attachment I for the specific student populations that need to be identified as distinct groups. The Preferred Private Loan Lender is expected to accommodate the campuses’ needs for identifying these distinct student groups to facilitate internal campus coordination.

Most campuses are currently receiving their funds via paper checks, and many of them would like to convert to electronic funds transfer (EFT) with the assistance and guidance of the Preferred Private Loan Lender. A few of the campuses that currently receive paper checks actually prefer receiving the funds in this manner or have local campus systems that are not capable of supporting EFT disbursements. For those campuses that will be

receiving paper checks, the Preferred Private Loan Lender(s) will need to make the checks payable in the manner specified by the campus (e.g., student only or copayable to the student and UC Regents). For copayable checks, "UC Regents" is the payee name the Preferred Private Loan Lender(s) shall use for the University. The Preferred Private Loan Lender(s) will need to conform to the individual needs of each campus office, and in some cases, this means that different offices on the same campus may want the funds handled differently. (Refer to Attachment I.)

The above information is not intended to be an exhaustive list of the differences that exist among the campuses as well as within campuses but, rather, is intended to illustrate that, although the University of California is one system, it consists of ten campuses with very different sets of needs.

INSTRUCTIONS TO BIDDERS

Quotation Receipt

Quotations must be addressed and delivered as follows:

1 original, signed Quotation to:

**Evan Fixler
UCLA Purchasing
10920 Wilshire Blvd. Ste 650
Los Angeles, CA 90024-6508**

and

3 copies to:

**UCOP Student Financial Support
1111 Franklin Street, 9th Floor
Oakland CA 94607-5200
Attn: Jackie Ito-Woo**

Quotations shall be in a sealed envelope marked:

**Name of Bidder
RFQ Number UCOP-PRIVATE_LOANS-2006
Date and Time Quotation Due**

Each printed copy of the Quotation must be accompanied by an electronic copy on diskette or CD. No telephone, telegraphic, or facsimile Quotations shall be considered. Quotations received after the time for closing shall not be considered.

Prerequisites to Award

The specific conditions that a Quotation and Bidder shall meet to be considered for award are as follows:

1. The Bidder attests that it is a U. S. based financial institution that lends money to students in the form of student loans and certifies its qualifications and agreement to fulfill the servicing requirements, specified in this RFQ, by completing, signing, and returning, as part of its Quotation, the Bidder Certification Form.
2. The Annual Percentage Rate (APR), as calculated by the University, of the proposed private loan for the credit-worthy students, as defined in Attachment E:

FICO Score Category, in a specific Discipline or Group, shall be no greater than the APR ceiling of the private loans currently available to credit-worthy students in that corresponding Discipline or Group. If the APR of the proposed loan for the credit-worthy students in a specific Discipline or Group is greater than the APR ceiling for that Discipline or Group, the proposal shall be deemed nonresponsive, and the Bidder shall not be considered for award. The APR ceiling for each Discipline or Group is as follows (the APRs are based on the interest rates as of November 9, 2005):

- a. Business: 6.69%
- b. Law: 6.64%
- c. Health Professions: 6.68%
- d. Other: 6.85%

This information is also provided on Attachment K: APR Ceilings. The assumptions the University will be using to calculate the APRs are provided in Attachment J: APR Calculation Assumptions.

- 3. The proposed private loans, with the exception of the specialty loans, shall have the following minimum terms:
 - a. Unless otherwise requested by the borrower, no repayment of interest and principal shall be required while the borrower is enrolled on at least a half-time basis, regardless of how long the student is enrolled on at least a half-time basis.
 - b. Unless otherwise requested by the borrower, no repayment of interest and principal shall be required during the grace period.
 - c. With the exception of loans for law and health professions students, the length of the grace period shall be at least six (6) months, from the time the borrower is no longer enrolled on at least a half-time basis. For law and health profession students, the length of the grace period shall be nine (9) months.
 - d. Loans for students in the health professions, and medical students in particular, shall, at borrower option, provide for no repayment of interest and principal for up to four (4) years during residency.
 - e. The loan shall not have a prepayment penalty.
 - f. The length of the repayment period shall be at least fifteen (15) years from the end of the grace period, or based on a minimum \$50 fixed (including principal and interest) monthly repayment installment amount, whichever pays the loan in full sooner.

4. The Bidder shall have at least five (5) years' experience in providing privately financed student loans.
5. The Bidder shall propose loan terms for each FICO Score Category, as defined in Attachment E. Failure of the Bidder to propose a loan for students in each FICO Score Category by completing fully Vendor Response Form 1 shall result in the Bidder being deemed nonresponsive and shall be disqualified from further consideration. This requirement, however, does not apply to the specialty loan; those loans can be offered at the option of the Bidder, unless otherwise indicated in this RFQ.
6. If selected as a Preferred Private Loan Lender, the Bidder agrees that students whose credit rating scores fall within a given range, specified in Attachment E, shall receive the corresponding loan terms, proposed on Vendor Response Form 1, for the applicable Credit Rating Score category. If both the student's and the cosigner's credit are rated, the Bidder agrees that the corresponding loan terms will be based on the individual who has the highest credit rating.
7. If selected as a Preferred Private Loan Lender, the Bidder agrees that the University and its current and former students shall receive the level of service that is no less than that proposed in Vendor Response 1-8, inclusive.
8. All borrower and cosigner benefits, described in Vendor Response Form 1, shall be incorporated into the loan promissory note or such other document that serves to guarantee the benefit, provided the borrower or cosigner meet the eligibility criteria as stipulated in Vendor Response Form 1.
9. If selected as a Preferred Private Loan Lender, the Bidder agrees to provide a toll-free telephone number for the University's staff to reach the Preferred Private Loan Lender's appropriate staff. The University prefers that the toll-free number for University staff be different than the toll-free number for students.
10. If selected as a Preferred Private Loan Lender, the Bidder agrees to assign a specific customer service representative to each campus/program.
11. If selected as a Preferred Private Loan Lender, the Bidder agrees to provide a toll-free telephone number for the University's students to reach the Preferred Private Loan Lender's appropriate staff. The University prefers that the toll-free number for UC students be different than the toll-free number for University staff.
12. If selected as a Preferred Private Loan Lender, the Bidder agrees to provide and support an online, interactive, real-time borrower application with electronic signatures accepted.
13. If selected as a Preferred Private Loan Lender, the Bidder agrees, if so requested by the campus/program, to provide a web portal via the campus's

- website for students/borrowers to access the online, interactive, real-time borrower application.
14. The Bidder attests that it does not currently sell its privately financed loans to a secondary market holder in its normal course of business and has no plans within the next five years to begin selling its privately financed loans to any entity in the secondary market.
 15. If selected as a Preferred Private Loan Lender, the Bidder agrees to support multiple disbursements of loan proceeds to the borrower, based on the frequency and disbursement dates established by the campus/program. Since some programs at a campus may be on semesters while other programs at that same campus may be on quarters, the frequency of the loan disbursements may be different at a given campus, depending on the category of students being served.
 16. If selected as a Preferred Private Loan Lender, the Bidder agrees to provide the necessary loan disbursement support services as well as any electronic or manual interface required to meet each campus's needs. This includes, but is not limited to, producing loan disbursement amounts via paper checks for those campuses or programs that need or want paper checks but also sending funds electronically to those campuses or programs that prefer receiving the funds in that manner. If the campus/program opts to receive the funds via paper checks, the campus/program shall have the option to request payment in either the student name, school name, or both (i.e., copayable). If the campus/program opts to receive its funds electronically, the Bidder agrees to transfer the funds electronically by campus and branch code within the campus. Refer to Attachments H and I for some of the required loan disbursement support services. In addition, as the Preferred Private Loan Lender, the Bidder agrees to work with those campuses interested in replacing paper checks with electronic funds transfer capabilities, as noted in Attachment I.
 17. If selected as the Preferred Private Loan Lender, the Bidder attests that its services are ELM and OpenNet File Management System compliant as well as Common Line 4 compliant.
 18. If selected as the Preferred Private Loan Lender, the Bidder attests that it can process Change Transaction File records.
 19. If selected as a Preferred Private Loan Lender for students in the law discipline (refer to Attachment A), the Bidder agrees to provide Bar Study Loans for law students who meet the Bidder's eligibility criteria. In other words, eligibility for these loans can be based on the student's credit worthiness, and the Bidder is not required to make these loans available to all students regardless of their credit worthiness. Bidders who submit a Quotation for Law shall complete Vendor Response Form 6.

20. If selected as a Preferred Private Loan Lender, the Bidder agrees to provide loan volume and borrower performance statistics at the discipline or group level with campus level detail and totals. The frequency of such reports is to be negotiated, but monthly or quarterly is the most likely frequency to be requested by the University. Attachment L: Report Information & Samples provides a description of the type of data the Preferred Private Loan Lender would be expected to furnish to the Office of the President as well as to the campus office(s).

21. If selected as the Preferred Private Loan Lender, the Bidder agrees that there should be minimal, if any, additional costs or expenses or workload for the campus.

QUOTATION REQUIREMENTS

Quotation Format

Quotations shall be submitted in the following format. Quotations in any other format will be considered informal and will be rejected. Conditional Quotations will not be considered. An individual authorized to extend a formal Quotation must sign all Quotations. If the Bidder fails to provide any of the following information, the University may, at its sole option, ask the Bidder to provide the missing information or evaluate the Quotation without the missing information.

Quotations must include all of the elements listed below, referenced by the corresponding numbers and in the order listed.

- 1 Completed Bidder Certification/Signature Page
- 2 Completed Business Information Form
- 3 Completed Vendor Response Forms 1 through 8
- 4 Additional Comments and Supplementary Information as desired

If a Bidder wants to submit Quotations for more than one Discipline or Group, the Bidder shall submit a separate Quotation for each.

Quotation Preparation Costs

All costs incurred in the preparation and submission of the Quotation and related documentation will be borne by the Bidder.

The submission of a signed Quotation shall confirm the acceptance of all terms, conditions, and specifications of the RFQ, unless alternative language or provisions are offered, and the University agrees to, or accepts, the specific exceptions.

Cost Quotation

The cost structure of the proposed loan terms in the Bidder's Quotation, as quoted in Vendor Response Form 1, shall take into account all costs associated with the delivery of the loan products and services to the students and University, as well as the risk level of the borrowers and possible loan defaults. UC students will be the purchasers of the loans and direct recipients of the borrower services. The Bidder's Quotation shall not anticipate any purchase of services or any other form of payment from the University.

Key Action Dates

Listed below are the key action dates/times for this RFQ. If the University finds it necessary to change any of the dates as indicated below, an addendum to the RFQ will be sent to all prospective Bidders via email or fax.

Release of RFQ.....January 10, 2006
Completed Bidder Inquiry Forms Due Date.....January 17, 2006
Nonmandatory Bidders' Conference Call (University will supply the call-in information at a later date)..... January 23, 2006, 8:00 a.m. (Pacific Standard Time)
Quotation Due Date and TimeFebruary 1, 2006, 3 p.m. (Pacific Standard Time)
Award Date.....(to be determined)

Quotation Modifications or Withdrawal

No modification of submitted Quotations will be permitted in any form. Any Quotation may be withdrawn prior to the time set for the receipt of Quotations. No Quotation shall be withdrawn for a period of ninety (90) calendar days thereafter.

Bidder Representation

Each Bidder, by submitting a Quotation, represents that he/she:

- Assumes responsibility for examining carefully the RFQ, any addenda thereto, and all related materials and data referenced in the RFQ;
- Is fully aware of the nature, location, and scope of work, and the conditions to be encountered in performing the work, including services to the University, to loan applicants, and to borrowers;
- Meets all of the specific conditions listed under "Prerequisites to Award";
- Agrees to all of the requirements listed under "Prerequisites to Award"; and
- Based the Quotation upon the requirements described in the RFQ, any addenda thereto, and all related materials and data referenced in the RFQ.

Bidder Questions/RFQ Contact Person

Questions regarding this RFQ shall be submitted using the form as provided at the back of this RFQ document. Please submit via email or fax to:

Evan Fixler
University of California, Los Angeles
UCLA Purchasing Department
10920 Wilshire Blvd., #650
Los Angeles, CA 90024
Phone: (310) 794-2913
Fax: (310) 794-8020
efixler@finance.ucla.edu

Presentation

Bidders selected for final evaluation may be required to make an oral presentation of their Quotation. Such presentations provide an opportunity for the Bidder to clarify its Quotation to ensure a mutual understanding. Scheduling of time and location for these presentations will be arranged by the University Purchasing Department. Failure to comply with this scheduling procedure may result in Bidder disqualification.

Contacts with University Personnel

With the exception of the designated contact at the University Purchasing Department, Bidders are not permitted to communicate with University staff regarding this solicitation during the period between the RFQ issue date and the announcement of award(s), except during the following:

- The course of a Bidders' Conference;
- Oral presentations, if conducted; and
- Any communications initiated by the designated contact at the University Purchasing Department.

If a Bidder is found to be in violation of this provision, the University reserves the right to reject the Bidder's Quotation.

Simplicity of Preparation

Quotations should be prepared simply and economically, providing straightforward, concise answers to the questions in the Vendor Response Forms and any needed descriptions of the Bidder's capability or services in response to the Request for Quotation. The Bidder's responses provided on the Vendor Response Forms do not have to be in complete sentences if one or a few words can clearly communicate the answer. Special bindings, color displays, etc., are not desired. Promotional materials are especially discouraged.

METHOD OF AWARD

There are three sequential tests involved in the award process. A Bidder's Quotation for a given Discipline or Group can be disqualified or eliminated by failing to pass any one of the tests:

The first test is to determine if the Quotation consists of the minimally required components:

1. Completed Bidder Certification/Signature Page
2. Completed Business Information Form
3. Completed Vendor Response Form 1: Loan Terms, Factors Used in Calculating APR, Lines 1-13, for all four (4) FICO score categories.
4. For Bidders submitting Quotations for Law, completed Vendor Response Form 6: Specialty Loans.
5. Completed Vendor Response Forms 1 through 8

The second test is to determine if the Bidder's APR, as calculated by the University, for the credit-worthy category is equal to or less than the APR ceiling for the applicable Discipline or Group. The University will compute an APR for the Bidder's Quotation, based on the Bidder's responses to Vendor Response Form 1: Loan Terms, Factors Used in Calculating APR, for the credit-worthy category. For example, if the Bidder submits a Quotation for Health Professions, the Bidder's University-calculated APR must be equal to or less than the APR ceiling for Health Professions. If the Bidder's University-calculated APR is greater than the stated APR ceiling for Health Professions, the Bidder's Quotation for Health Professions will be considered nonresponsive and disqualified from further consideration. It is possible that a Bidder's Quotation for one Discipline or Group is disqualified while another Quotation from that same Bidder but for a different Discipline or Group is not disqualified. Attachment J: APR Calculation Assumptions provides the assumptions used by the University in calculating the APR.

For Business, Law, and Health Professions, no evaluation or analysis will be made with respect to the APR of the proposed loan terms that correspond to the other FICO credit score ranges, i.e., Credit Ready, Low Credit, and Poor Credit, as defined in Attachment D: FICO Score Category. For the "Other" category, no evaluation or analysis will be made with respect to the APR of the proposed loans that correspond to the FICO credit score ranges for the Low Credit and Poor Credit categories; in keeping with the Prerequisites to Award, the APR for the Credit Worthy category must be equal to or less than the APR currently available to UC students. No Preferred Private Loan Lender for a given Discipline or Group will be selected, however, if the APR, as calculated by the University and based on the information in each Bidder's Quotation for the Credit-Worthy category, is greater than the lowest APR currently available to any UC student in that Discipline or Group. (Refer to Attachment K: APR Ceiling.)

Submission of partial data may result in Bidder being deemed nonresponsive. If there are any requirements defined in this RFQ which are not included in a Bidder's Quotation by the Quotation Due Date and Time, a Bidder's Quotation will be deemed nonresponsive and will be rejected.

Evaluation Criteria

Only those Quotations that pass the first two tests, described above, will have the following evaluation criteria applied. In other words, only those Quotations that contain all the required components and have University-calculated APRs for the credit-worthy category that are equal to or lower than the APR for the respective Discipline or Group will be given further consideration.

The Bidder with the lowest University-calculated APR for the **credit-worthy** category, as defined in Attachment E: FICO Score Category, for "Business" will be deemed the responsive Bidder for "Business." The Bidder with the lowest University-calculated APR for the **credit-worthy** category, as defined in Attachment E: FICO Score Category, for "Health Professions" will be deemed the responsive Bidder for "Health Professions." The Bidder with the lowest University-calculated APR for the **credit-worthy** category, as defined in Attachment E: FICO Score Category, for "Law" will be deemed the responsive Bidder for "Law." The Bidders with the two lowest University-calculated APRs for the **credit-ready** (not credit-worthy) category, as defined in Attachment E: FICO Score Category, for "Other" will be deemed the responsive Bidders for "Other." APRs will be calculated up to the twelfth decimal place (i.e., .000000000000%).

If a tie breaker is needed, the Bidders submitting the Quotations with the identical APRs for a given Discipline or Group will be given an opportunity to revise their Quotations and resubmit them. The University will recalculate the APRs, based on the revised Quotation. The Bidder with the lowest, revised APR will be deemed the responsive Bidder, provided that the revised APR is not greater than the Bidder's original APR. If this latter situation arises, then all of the Bidders' APRs for that Discipline or Group will be compared against the revised APR. If a different Bidder now has the lowest APR, then that Bidder will be deemed the responsive Bidder for that Discipline or Group, even if that Bidder was not one involved in the original tie breaker. In other words, the Bidder deemed to be the responsive Bidder for a given Discipline or Group must have the lowest APR for that Discipline or Group.

Opportunity Awarded

Each Bidder whose Quotation is deemed responsive for a given Discipline or Group, pursuant to the methodology and criteria described above, will be awarded the opportunity to engage in final negotiations on the provisions of the Agreement. For the Discipline or

Group titled "Other," there will be two Bidders whose Quotations are deemed responsive and, thus, each Bidder will be awarded the opportunity to engage in final negotiations. If, however, the University and the apparent successful Bidder(s) are unable to reach agreement, the University reserves the right to cease negotiations with that Bidder and either award the Bidder with the next lowest APR for that Discipline or Group the opportunity to negotiate or reject all Quotations for that Discipline or Group. If the parties are unable to reach agreement, the University reserves the right to cease negotiations with the second Bidder and reject all proposals for that Discipline or Group. Either agreement on the provisions of the Agreement for a given Discipline or Group is reached, or the University rejects all proposals for that Discipline or Group.

Contract Award in Best Interest

The University reserves the right to accept or reject Quotations on each item separately or as a whole, to reject any or all Quotations without penalty, to waive any informalities or irregularities therein, and to contract as the best interest of the University may require in order to obtain the loan products and services that best meet the needs of the University and its students, as expressed in this RFQ. The University reserves the right to negotiate the modification of terms and conditions with the Bidder offering the best value to the University and its students, in conjunction with the award criteria contained herein, prior to the execution of a contract to ensure a satisfactory contract. Award shall be made to the responsive, responsible Bidder whose Quotation is determined to be the most advantageous to the University and its students, taking into consideration the evaluation factors set forth in the solicitation.

TERMS AND CONDITIONS

University of California Employees

The University of California Terms and Conditions, Appendix A shall be incorporated into any agreement resulting from this RFQ.

The University reserves the right to accept or reject any or all Quotations and to waive any irregularities. The University reserves the right to make one award, more than one award, or no award. Awards will be made in the best interests of the University. Any resulting purchase order will incorporate the specifications, terms, and conditions set forth in this RFQ as well as all relevant provisions of the related Quotation.

Conflict of Interest

All Quotations must indicate any/all known University of California employees and/or near relatives who hold a position in your organization or have been engaged as an employee, contractor or consultant for your organization within the last two years. Also indicate any known University of California employees or near relatives who own or control more than a ten percent (10%) interest in your organization. If there are none, so state.

Vendor shall not hire any officer or employee of the University to perform any service covered by this agreement.

Vendor affirms that to the best of his or her knowledge there exists no actual or potential conflict between Vendor's family, business, or financial interest and the service provided under this agreement, and in the event of change in either private interests or service under this agreement, any question regarding possible conflict of interest which may arise as a result of such change will be raised with the University.

Vendor shall not be in a reporting relationship to a University employee who is a near relative, nor shall the near relative be in a decision-making position with respect to the Vendor.

University's Right to Reject or Modify

Selection of a Quotation does not mean that all aspects of the Quotation(s) are acceptable to the University. The University reserves the right to negotiate the modification of the Quotation terms and conditions prior to the execution of a contract, to ensure a satisfactory procurement.

Renewal Options

The term of this Agreement shall begin upon execution of the Agreement, recognizing that the Vendor will need to coordinate and work with the University and specific campus

offices, and prepare for the provision and delivery of services for the private loans for the 2006-07 financial aid award year. This coordination and preparatory work will need to occur prior to the beginning of 2006-07 financial aid award year. Upon mutual written agreement by both the University and Vendor, this Agreement may be renewed for up to four (4) additional financial aid award years, extending through the Summer term of 2011, for those campus programs that use the summer term as a trailer.

Supplemental Terms and Conditions/Modifications

Any supplemental terms or conditions, or modification or waiver of these terms and conditions must be in writing and signed by Vendor and University.

Disclosure of Records

All bids, supporting materials, and related documentation will become the property of the University.

This RFQ, together with copies of all documents pertaining to any award, if issued, shall be kept for a period of five years from date of contract expiration or termination and made part of a file or record which shall be open to public inspection. If the response contains any trade secrets that should not be disclosed to the public or used by UCLA for any purpose other than evaluation of your approach, the top of each sheet of such information must be marked with the following legend:

“CONFIDENTIAL INFORMATION”

All information submitted as part of the bid must be open to public inspection (except items marked as trade secrets and considered trade secrets under the California Public Records Act) after the award has been made. Should a request be made of UCLA for information that has been designated as confidential by the Bidder and on the basis of that designation, UCLA denies the request for information, the Bidder may be responsible for all legal costs necessary to defend such action if the denial is challenged in a court of law.

Form of Agreement

The contents of this RFQ, RFQ Addenda, and the Quotation document of the successful vendor shall become contractual obligations as part of the Contract if acquisition action ensues and will be set forth in the Purchase Order. Failure of successful vendor to accept these obligations in a contractual agreement shall result in cancellation of award. The University reserves the right to negotiate provisions in addition to those stipulated in this RFQ or proposed by vendor for the purpose of obtaining the best possible offer.

Performance Standard

All work performed shall be first class in every respect and shall conform to the highest standards of the industry.

Marketing References

The successful vendor shall be prohibited from making any reference to University, in any literature, promotional material, brochures, or sales presentations without the express written consent of the University.

Proprietary Information

Any restrictions on the use of data contained in a Quotation must be clearly stated in the Quotation itself. Proprietary information submitted in response to the Request for Quotation will be handled in accordance with applicable University of California procurement regulations and the Public Records Act. Data contained in the Quotation, all documentation provided therein, and innovations developed as a result of these contractual services cannot be copyrighted or patented by vendors. All data, documentation, and innovations become the property of the University.

Insurance Requirements

The successful Vendor shall defend, indemnify, and hold the University, its officers, employees, and agents harmless from and against any and all liability, loss, expense (including reasonable attorneys' fees), or claims for injury or damages that are caused by or result from the negligent or intentional acts or omissions of Seller, its officers, agents, or employees.

Vendor, at its sole cost and expense, shall insure its activities in connection with the work under this order and obtain, keep in force, and maintain insurance as follows:

A. Comprehensive or Commercial Form General Liability Insurance (contractual liability included) with limits as follows:

Each Occurrence	\$1,000,000.00
Products/Completed Operations Aggregate	\$2,000,000.00
Personal and Advertising Injury	\$1,000,000.00
General Aggregate (Not applicable to the Comprehensive Form)	\$2,000,000.00

If the above insurance is written on a claims-made form, it shall continue for three years following termination of this Agreement. The insurance shall have a retroactive date of placement prior to or coinciding with the effective date of this Agreement.

B. Business Automobile Liability Insurance for owned, scheduled, non-owned, or hired automobiles with a combined single limit not less than \$1,000,000.00 dollars per occurrence.

(REQUIRED ONLY IF VENDOR DRIVES ON UNIVERSITY PREMISES IN THE COURSE OF PERFORMING WORK FOR UNIVERSITY.)

C. Workers' Compensation as required by California State law.

It is understood that the coverage and limits referred to under A., B., and C. above shall not in any way limit the liability of Vendor. Vendor shall furnish the University with certificates of insurance evidencing compliance with all requirements prior to commencing work under a contract resulting from this RFQ. Such certificates shall:

(1) Provide for thirty (30)-days advance written notice to the University of any modification, change, or cancellation of any of the above insurance coverage.

(2) Indicate that The Regents of the University of California has been endorsed as an additionally insured for the coverage referred to under A. and B. This provision shall only apply in proportion to and to the extent of the negligent acts or omissions of Vendor, its officers, agents, or employees.

(3) Include a provision that the coverage will be primary and will not participate with nor be excess over any valid and collectible insurance or program of self-insurance carried or maintained by the University.

Statement of Work

University and Vendor will develop Statement of Work based on any necessary modifications of proposed Scope of Work.

Ownership of Work

OWNERSHIP OF ANY WORK DEVELOPED UNDER THIS ORDER, AND ALL RIGHT TITLE AND INTEREST THEREIN SHALL VEST IN THE REGENTS OF THE UNIVERSITY OF CALIFORNIA. IN ORDER TO EFFECTUATE THE FOREGOING, IT IS EXPRESSLY UNDERSTOOD AND ACKNOWLEDGED THAT THE WORK SHALL BE DEEMED TO BE A WORK MADE FOR HIRE UNDER THE U.S. COPYRIGHT LAWS. IN THE EVENT THAT THE WORK IS DETERMINED BY A COURT OR COMPETENT JURISDICTION NOT TO BE A WORK MADE FOR HIRE UNDER THE U.S. COPYRIGHT LAWS, THIS AGREEMENT SHALL OPERATE AS AN IRREVOCABLE ASSIGNMENT BY THE SUCCESSFUL BIDDER TO THE REGENTS OF THE UNIVERSITY OF CALIFORNIA OF THE COPYRIGHT IN THE WORK, INCLUDING ALL RIGHT, TITLE AND INTEREST IN PERPETUITY.

BIDDER INQUIRY FORM

RFQ No. UCOP-PRIVATE_LOANS-2006

Bidders should use this form to submit questions regarding the RFQ. University will provide a complete list of questions received along with the University's responses to all Bidders who participate. Questions will be listed without reference to the source.

Name of Company:

Company Representative:

Question(s)

Note: Reproduce this form as necessary.

Fax or email (preferred) this form to: Evan Fixler
UCLA Purchasing Department
fax #: (310) 794-6030
email: efixler@finance.ucla.edu

1. BIDDER CERTIFICATION/SIGNATURE PAGE

Quotation for Private Loans for _____ (specify which Discipline or Group)

AUTHORIZED SIGNATURE: This RFQ Quotation must be signed with the full name and address of the Bidder; if a co-partnership, by a member of the firm with the name and address of each member; if a corporation, by an authorized officer thereof in the corporate name.

The below-named individual, submitting and signing this Quotation, verifies that he/she is a duly authorized officer of the company, certifies the company satisfies the Prerequisites to Award qualifications and conditions, commits the company to fulfill satisfactorily the servicing and lending requirements as specified in this RFQ, and that his/her signature attests that all items and conditions contained in this Request for Quotation for Private Loans for UC Students, **UCOP-PRIVATE_LOANS-2006**, are understood and accepted.

DATE

AUTHORIZED SIGNATURE

COMPANY NAME

PRINT NAME OF AUTHORIZED SIGNATURE

ADDRESS

CITY/STATE/ZIP CODE

TELEPHONE NO. WITH AREA CODE

EMAIL ADDRESS

As a supplier of goods and services to the University of California I/we certify that racially segregated facilities will not be maintained nor provided for employees at any establishment under my/our control, and that I/we adhere to the principals set forth in Executive Order 11246 and 11375, and undertake specifically to maintain employment policies and practices that affirmatively promote equality of opportunity for minority group persons and women, to take affirmative steps to hire and promote women , to take affirmative steps to hire and promote women and minority group persons at all job levels and in all aspects of employment, to communicate this policy in both English and Spanish to all persons concerned within the company, with outside recruiting services and the minority community at large to provide the University on request a breakdown of our total labor force by ethnic group, sex, and job category, and to discuss with the University our policies and practices relating to our affirmative action program.

ATTACHMENTS

- Bidder Certification/Signature Page
- Business Information Form
- Attachment A: Disciplines and Groups
- Attachment A1: Self-Supporting Programs
- Attachment B: Student Eligibility Criteria
- Attachment C: Loan Limits
- Attachment D: Borrower Situations
- Attachment E: FICO Score Category
- Attachment F: 2004-05 Enrollment and Private Loan Volume
- Attachment G: 2005-06 Tuition and Fees (State Supported Programs)
- Attachment G1: 2005-06 Fees for Self-Supporting Programs
- Attachment H: Campus Offices and Students Served
- Attachment I: Campus Disbursement Needs
- Attachment J: APR Calculation Assumptions
- Attachment K: APR Ceilings
- Attachment L: Report Needs and Samples
- The University of California Terms and Condition (Appendix A)

VENDOR RESPONSE FORMS (VRF)

- VRF 1: APR Information & Proposed Loan Terms
- VRF 2: Application & Loan Processing
- VRF 3: Customer Service
- VRF 4: Debt Counseling
- VRF 5: Loan Disbursements & Reconciliation
- VRF 6: Specialty Loans
- VRF 7: Technical Support
- VRF 8: Campus Costs & Workload Issues

DISCIPLINES AND GROUPS

1. **BUSINESS:** Students who are enrolled in U. C. Masters in Business Administration programs or joint-degree programs with business. These students are typically paying either the professional degree fee or the fee assessed to students in self-supporting programs (aggregate loan volume in 2004-05: \$14 million):
 - a. U. C. Berkeley
 - b. U. C. Davis
 - c. U. C. Irvine
 - d. U. C. Los Angeles
 - e. U. C. Riverside
 - f. U. C. San Diego

2. **LAW:** Students who are enrolled at U. C. law schools or are in joint-degree programs with law. Most of these students pay the professional degree fee, but some pay the fee assessed to students in self-supporting programs (aggregate loan volume in 2004-05: \$13 million):
 - a. U. C. Berkeley
 - b. U. C. Davis
 - c. U. C. Los Angeles

3. **HEALTH PROFESSIONS:** Students who are enrolled in U. C. health profession programs (e.g., medicine and affiliated programs, optometry, dentistry, pharmacy, graduate nursing, veterinary medicine, physical therapy, public health, and clinical research). Most of these students pay the professional degree fee, but some pay the fee assessed to students in self-supporting programs (aggregate loan volume in 2004-05: \$3 million):
 - a. U. C. Berkeley (optometry and affiliated medical program with U. C. San Francisco)
 - b. U. C. Davis (medicine, veterinary medicine, and public health)
 - c. U. C. Irvine (medicine)
 - d. U. C. Los Angeles (medicine, dentistry, graduate nursing, and public health)
 - e. U. C. Riverside (affiliated program with U. C. Los Angeles)
 - f. U. C. San Diego (medicine, pharmacy, and clinical research)
 - g. U. C. San Francisco (medicine, dentistry, pharmacy, graduate nursing, physical therapy, and clinical research)

4. **OTHER:** All undergraduates and all other graduate-level students not in one of the above professional or self-supporting programs; the graduate-level students include, but are not limited to, those enrolled in graduate academic programs, teacher credential programs, self-supporting programs not in one of the above categories, and in public policy (UCB and UCLA) and the film/theater/television program (UCLA) who are being charged a professional degree fee. All campuses, except as noted. (aggregate loan volume in 2004-05: \$28 million)

(Refer to Attachment A1 for a listing of the self-supporting programs by Discipline or Group.)

UNIVERSITY OF CALIFORNIA
 Request for Quotation for Private Loans for UC Students
Attachment A1

SELF-SUPPORTING PROGRAMS
 (By Discipline or Group)

Code	Major Name	Campus	RFQ Discipline or Group
CSS			
764	ADM-HEALTH CARE EXECUTIVE	UCI	Business
921	BUS ADMIN-WORKING PROF	UCD	Business
921	BUS ADMIN-WORKING PROF	UCSD	Business
1E1	BUSINESS ADMIN-EWMBA	UCB	Business
1F1	BUSINESS ADMIN-MFE	UCB	Business
1C1	BUSINESS ADMIN-XMBA	UCB	Business
36S	EXEC MBA-SINGAPORE	UCLA	Business
364	EXECUTIVE MBA PROGRAM	UCI	Business
364	EXECUTIVE MBA PROGRAM	UCLA	Business
1F2	FINANCIAL ENGINEERING	UCLA	Business
65A	LEADERSHIP-HLTH CARE ORGS	UCSD	Business
602	MGMT-FULLY EMPLOYED MBA	UCI	Business
602	MGMT-FULLY EMPLOYED MBA	UCLA	Business
563	CLINICAL RESEARCH (SS)	UCSD	Health Professions
563	CLINICAL RESEARCH (SS)	UCSF	Health Professions
555	DENTISTRY (INTL-SELSUPP)	UCLA	Health Professions
555	DENTISTRY (INTL-SELSUPP)	UCSF	Health Professions
59D	NURSING-MEPN 1ST YR (SS)	UCSF	Health Professions
66D	PHYSICAL THERAPY-SELSUP	UCSF	Health Professions
793	PUBLIC HEALTH (MPH-HP)	UCLA	Health Professions
50A	INTL COMMERCIAL LAW	UCD	Law
	LAW - LLM (SS)	UCB	Law
	LAW - LLM (SS)	UCD	Law
50B	LAW - LLM (SS)	UCLA	Law
421	COMP ENGR-SELF SUPPORTING	UCSC	Other
20H	CREATIVE WRITING-PALM DES	UCR	Other
22B	CRIMINOLOGY, LAW & SOCIETY	UCI	Other
55A	FORENSIC SCIENCE	UCD	Other
659	LEADERSHIP COHORT-ED-UCLA	UCLA	Other
53B	MARINE BIODIVERS & CONSRV	UCSD	Other
	MATERNAL & CHILD NUTRITION	UCD	Other

(Refer to Attachment G1 for more details about the Self-Supporting Programs.)

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment B

STUDENT ELIGIBILITY CRITERIA

The following are the criteria for student eligibility for Private Loans:

1. The student must be an enrolled student, as defined by the campus Registrar, but the student can be enrolled less than half time.
2. The student cannot be in default on any Title IV aid.
3. The student cannot be in default on any institutional or other federal student aid.
4. The student cannot owe a refund on a federal student grant.

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Request for Quotation for Private Loans for UC Students
Attachment C

LOAN LIMITS

The following are the annual loan limits for the Private Loans, which will be certified by the campus:

1. If the student is not a U. S. citizen or permanent resident, i.e., is an international or undocumented alien student, and does not have an eligible cosigner (i.e., a credit-worthy or credit-ready cosigner who is a U. S. citizen or permanent resident), the annual maximum loan limit is equal to the required fees and tuition for the program in which the student is enrolled, less any financial aid. Required fees and tuition consist of the mandatory systemwide fees and tuition, including the Fee for Selected Professional School Students and the Special Fee for Medical and Law Students, as well as the mandatory health insurance fees, if not waived, and required campus fees. For students enrolled in self-supporting programs, the required fees and tuition are equal to the fees and/or tuition charged by the self-supporting program, as well as required campus fees. Some self-supporting programs also have a mandatory health insurance fee. (Attachment F displays only the mandatory systemwide fees and tuition.)
2. If the student is a U. S. citizen or permanent resident, the annual maximum loan limit is equal to the student expense budget (i.e., cost of attendance) less any financial aid.

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment D

BORROWER SITUATIONS

It is anticipated that, within each Discipline and Group (as listed in Attachment A), borrower situations that may be encountered include, but are not limited to, the following.

1. Credit-ready student (student with no credit information or less than 12 months of credit history) with no cosigner
2. Credit-ready student with a credit-worthy cosigner
3. Credit-ready student with a credit-ready cosigner
4. Credit-ready student with a low- or poor-credit cosigner
5. Credit-worthy student (student with good credit information) with no cosigner
6. Credit-worthy student with a credit-worthy cosigner
7. Credit-worthy student with a credit ready cosigner
8. Credit-worthy student with a low- or poor-credit cosigner
9. Student with low or poor credit with no cosigner
10. Student with low or poor credit with a credit-worthy cosigner
11. Student with low or poor credit with a credit-ready cosigner
12. Student with low or poor credit with a low- or poor-credit cosigner
13. International student with at least 3 years' credit history in the U. S. with no cosigner
14. International student with at least 3 years' credit history in the U. S. with a credit-worthy cosigner
15. International student with at least 3 years' credit history in the U. S. with a credit-ready cosigner
16. International student with at least 3 years' credit history in the U. S. with a low- or poor-credit cosigner
17. International student with less than 3 years' credit history in the U.S. with no cosigner
18. International student with less than 3 years' credit history in the U.S. with a credit-worthy cosigner
19. International student with less than 3 years' credit history in the U.S. with a credit-ready cosigner
20. International student with less than 3 years' credit history in the U.S. with a low- or poor-credit cosigner
21. Undocumented alien student with no cosigner
22. Undocumented alien student with a credit-worthy cosigner
23. Undocumented alien student with a credit-ready cosigner
24. Undocumented alien student with a low- or poor-credit cosigner

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment E

FICO SCORE CATEGORY

It is anticipated that each of the borrower situations, listed in Attachment D, will fall into one of the credit categories below, typically referred to as the Fair Isaac Corporation, or FICO, score. The Preferred Lender for a given Discipline or Group shall provide a loan that corresponds to each of the listed credit rating score categories. If a student meets the University's established eligibility criteria, as certified by the campus, the Preferred Lender shall offer the student a loan that corresponds to the student's (or the student's cosigner's) FICO score, based on the chart, below, up to the amount certified by the campus.

1. CREDIT WORTHY: Credit Rating Score = 670 or higher (credit worthy borrower or cosigner, whoever has the higher score)
2. CREDIT READY: Credit Rating Score = 610 to 669 (credit ready borrower or cosigner, whoever has the higher score)
3. LOW CREDIT: Credit Rating Score = 570 to 609
4. POOR CREDIT: Credit Rating Score = 569 or less

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment F

2004-05 ENROLLMENT AND PRIVATE LOAN VOLUME

DISCIPLINE OR GROUP	PROGRAM	CITIZENSHIP	ENROLL- MENT	LOAN RECIPIENTS	LOAN AMOUNT	AVERAGE ANNUAL LOAN AMOUNT
(A) Business	Prof Fee Business	Domestic	1,167	409	\$8,548,136	\$20,900
(A) Business	Prof Fee Business	International	404	44	\$1,456,082	\$33,093
(A) Business	Prof Fee Joint Business/Law	Domestic	21	7	\$87,774	\$12,539
(A) Business	Prof Fee Joint Business/Medicine	Domestic	6	0	\$0	
(A) Business	Self Support Business	Domestic	2,470	216	\$3,765,233	\$17,432
(A) Business	Self Support Business	International	223	13	\$317,060	\$24,389
(A) Business	Self Support Business	Unknown	1	0	\$0	
Subtotals - Business			4,292	689	\$ 14,174,284	\$ 20,572
(B) Law	Prof Fee Law	Domestic	2,355	943	\$12,372,869	\$13,121
(B) Law	Prof Fee Law	International	96	11	\$347,086	\$31,553
Subtotals - Law			2,451	954	\$ 12,719,955	\$ 13,333
(C) Health Professions	Prof Fee Dentistry	Domestic	667	27	\$227,422	\$8,423
(C) Health Professions	Prof Fee Dentistry	International	4	1	\$66,180	\$66,180
(C) Health Professions	Prof Fee Medicine	Domestic	2,648	65	\$359,996	\$5,538
(C) Health Professions	Prof Fee Medicine	International	8	0	\$0	
(C) Health Professions	Prof Fee Nursing	Domestic	612	6	\$47,869	\$7,978
(C) Health Professions	Prof Fee Nursing	International	12	0	\$0	
(C) Health Professions	Prof Fee Optometry	Domestic	229	2	\$40,000	\$20,000
(C) Health Professions	Prof Fee Optometry	International	5	1	\$15,000	\$15,000
(C) Health Professions	Prof Fee Pharmacy	Domestic	565	9	\$66,846	\$7,427
(C) Health Professions	Prof Fee Pharmacy	International	6	3	\$102,000	\$34,000
(C) Health Professions	Prof Fee Veterinary Medicine	Domestic	505	79	\$506,915	\$6,417
(C) Health Professions	Prof Fee Veterinary Medicine	International	10	1	\$4,470	\$4,470
(C) Health Professions	Self Support Health Professions	Domestic	199	20	\$512,411	\$25,621
(C) Health Professions	Self Support Health Professions	International	49	16	\$1,096,335	\$68,521
Subtotals - Health Professions			5,519	230	\$ 3,045,444	\$ 13,241

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment F

DISCIPLINE OR GROUP	PROGRAM	CITIZENSHIP	ENROLL- MENT	LOAN RECIPIENTS	LOAN AMOUNT	AVERAGE ANNUAL LOAN AMOUNT
(D) Undergrads, Grad Acad & All Others	Academic	Domestic	22,876	144	\$1,440,905	\$10,006
(D) Undergrads, Grad Acad & All Others	Academic	International	6,818	17	\$323,383	\$19,023
(D) Undergrads, Grad Acad & All Others	Academic	Unknown	5	0	\$0	
(D) Undergrads, Grad Acad & All Others	Grad Unknown	Domestic	52	0	\$0	
(D) Undergrads, Grad Acad & All Others	Grad Unknown	International	6	0	\$0	
(D) Undergrads, Grad Acad & All Others	Postbacc	Domestic	417	18	\$137,063	\$7,615
(D) Undergrads, Grad Acad & All Others	Postbacc	International	2	0	\$0	
(D) Undergrads, Grad Acad & All Others	Prof Fee Theatre, Film, & TV	Domestic	269	49	\$503,141	\$10,268
(D) Undergrads, Grad Acad & All Others	Prof Fee Theatre, Film, & TV	International	27	2	\$52,000	\$26,000
(D) Undergrads, Grad Acad & All Others	Prof Fee Unknown	Domestic	1	0	\$0	
(D) Undergrads, Grad Acad & All Others	Prof No Fee	Domestic	3,510	232	\$2,466,349	\$10,631
(D) Undergrads, Grad Acad & All Others	Prof No Fee	International	282	8	\$143,412	\$17,927
(D) Undergrads, Grad Acad & All Others	Prof No Fee	Unknown	2	0	\$0	
(D) Undergrads, Grad Acad & All Others	Self Support Other	Domestic	182	4	\$96,500	\$24,125
(D) Undergrads, Grad Acad & All Others	Self Support Other	International	19	0	\$0	
(D) Undergrads, Grad Acad & All Others	Self Support Other	Unknown	1	0	\$0	
(D) Undergrads, Grad Acad & All Others	Undergraduate	Domestic	161,105	2,379	\$20,625,388	\$8,670
(D) Undergrads, Grad Acad & All Others	Undergraduate	International	4,320	74	\$1,581,583	\$21,373
(D) Undergrads, Grad Acad & All Others	Undergraduate	Unknown	233	0	\$0	
(D) Undergrads, Grad Acad & All Others	Unknown Level	Unknown	2,676	33	\$475,334	\$14,404
Subtotals - Other			202,803	2,960	\$ 27,845,057	\$ 9,407
GRAND TOTALS			215,065	4,833	\$ 57,784,740	11,956

Source: Corporate Student System, May 2005 Preliminary Academic Year File

Notes:

- 1) Except for UCLA, figures reported based on "Paid" Amounts as of May 2005 file; for UCLA, "awarded" amounts were used.
- 2) Above figures do not include \$1,051,027 in private loans paid in Summer 2004.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

BERKELEY -- Undergraduate Students

Annual Fees

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Berkeley Campus Fee	296.50	296.50
Transit Fee	74.40	74.40
Total Campus-Wide Fees (w/o insurance)	\$ 6,511.90	\$ 24,331.90
Student Health Insurance Fee	922.00	922.00
Total Campus-Wide Fees (with insurance)	7,433.90	25,253.90

BERKELEY -- Graduate Students

Annual Fees

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00
Total Campus-Wide Fees	\$ 8,439.90	\$ 23,400.90

* In addition to total campus-wide fees, graduate students in law who are not subject to the Fee for Selected Professional School Students are charged required instructional materials fees.

BERKELEY -- Law (JD) Students

Annual Fees

	Law	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00
Total Campus-Wide Fees	\$ 8,334.90	\$ 20,579.90
Law Instructional Materials Fee	30.00	30.00
Special Fee for Law School Students	376.00	376.00
Total Law School Fees	\$ 8,740.90	\$ 20,985.90
Professional Degree Fee (includes supplemental increases)	\$ 15,600.00	\$ 15,600.00

Note: Some programs, such as medicine and dentistry charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

TOTAL LAW SCHOOL FEES (JD) \$ 24,340.90 \$ 36,585.90

BERKELEY -- MBA Students

Annual Fees

	MBA	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00

Total Campus Fees \$ 8,334.90 \$ 20,579.90

Professional Degree Fee (includes supplemental increases) **\$ 15,990.00 \$ 15,276.00**

TOTAL MBA FEES \$ 24,324.90 \$ 35,855.90

BERKELEY -- Medical Students (1)

Annual Fees

	Medicine	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00

Total Campus-Wide Fees \$ 8,334.90 \$ 20,579.90

Disability Insurance Fee for Medical Students 61.00 61.00

Special Fee for Medical School Students 376.00 376.00

Professional Fee **13,064.00 13,064.00**

TOTAL MEDICAL STUDENT FEES \$ 21,835.90 \$ 34,080.90

BERKELEY -- Optometry Students

Annual Fees

	Optometry	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00

Note: Some programs, such as medicine and dentistry charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Total Campus Fees	\$ 8,334.90	\$ 20,579.90
Professional Fee	9,340.00	9,340.00
TOTAL OPTOMETRY FEES	17,674.90	29,919.90

BERKELEY -- Public Health Students (MPH & DrPH)

Annual Fees

	Public Health	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00
Total Campus Fees	\$ 8,439.90	\$ 20,951.90
Professional Fee	4,000.00	4,000.00
TOTAL PUBLIC HEALTH FEES	12,439.90	24,951.90

BERKELEY -- Public Policy

Annual Fees

	Public Policy	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Berkeley Campus Fees	296.50	296.50
Transit Fee	74.40	74.40
Student Health Insurance Fee	1,172.00	1,172.00
Total Campus Fees	\$ 8,439.90	\$ 20,951.90
Professional Fee	4,000.00	4,000.00
TOTAL PUBLIC POLICY FEES	12,439.90	24,951.90

Note: Some programs, such as medicine and dentistry charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

DAVIS -- Undergraduate Students

Annual Fees

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Associated Students Fee	105.00	105.00
Memorial Union Fee	85.50	85.50
Student Services Maintenance Fee and Student Activities and Services Initiative Fee (Undergraduates only)	285.00	285.00
Facilities & Campus Enhancements Fee	315.00	315.00
Campus Expansion Initiative (Part A)	336.00	336.00
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Total Campus-Wide Fees (w/o insurance)	\$ 7,456.50	\$ 25,276.50
Student Health Insurance Plan	\$ 672.00	\$ 672.00
Total Campus-Wide Fees (with insurance)	\$ 8,128.50	\$ 25,948.50

DAVIS -- Graduate Students

Annual Fees

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Graduate Student Association Fee	36.00	36.00
Memorial Union Fee	85.50	85.50
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Facilities & Campus Enhancements Fee	315.00	315.00
Campus Expansion Initiative Fee	66.00	66.00
Graduate and Professional Student Health Insurance Fee	1,371.00	1,371.00
Total Campus-Wide Fees	\$ 8,959.50	\$ 23,920.50

DAVIS -- Law Students

Annual Fees

	Law	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Memorial Union Fee	85.50	85.50
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Legal Ed Enhancement & Access Fee	313.00	313.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Campus Expansion Initiative	57.60	57.60
Graduate and Professional Student Health Insurance Fee	1,372.00	1,372.00
Law Student Association Fee	20.00	20.00
Special Fee for Law School Students	376.00	376.00
Professional Fee	\$ 14,319.00	\$ 14,319.00
TOTAL LAW STUDENT FEES	23,524.10	35,769.10

DAVIS -- MBA Students

Annual Fees

	MBA	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Graduate Student Association Fee	36.00	36.00
Memorial Union Fee	85.50	85.50
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Facilities & Campus Enhancements Fee	315.00	315.00
Campus Expansion Initiative	66.00	66.00
Graduate and Professional Student Health Insurance Fee	1,371.00	1,371.00
Professional Fee	14,276.00	14,276.00
TOTAL MBA STUDENT FEES	23,130.50	35,375.50

DAVIS -- Medical Students

Annual Fees

	Medicine	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Memorial Union Fee	85.50	85.50
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Facilities & Campus Enhancements Fee	315.00	315.00
Campus Expansion Initiative	66.00	66.00
Graduate and Professional Student Health Insurance Fee	1,371.00	1,371.00
Disability Insurance Fee for Medical School Students (collected Fall only)	2,587.50	61.00
Course Materials Fees	500.00	500.00
Special Fee for Medical School Students	376.00	376.00
Professional School Fee	13,440.00	\$ 13,064.00
TOTAL MEDICAL STUDENT FEES	22,819.50	35,064.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

DAVIS -- Veterinary Medicine Students

Annual Fees	Veterinary Medicine	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Memorial Union Fee	85.50	85.50
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Facilities & Campus Enhancements Fee	315.00	315.00
Campus Expansion Initiative	66.00	66.00
Graduate and Professional Student Health Insurance Fee	1,371.00	1,371.00
Course Materials Fee (DVM students admitted since 99-00)	2,000.00	2,000.00
Professional School Fee	10,882.00	10,882.00
TOTAL VET MED STUDENT FEES	\$ 21,700.50	\$ 33,945.50

DAVIS -- Public Health Students

Annual Fees	Public Health	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
GSA Fee	36.00	36.00
Memorial Union Fee	85.50	85.50
Student Facilities Safety Fee	66.00	66.00
Student Services Health Fee	123.00	123.00
Facilities & Campus Enhancements Fee	315.00	315.00
Campus Expansion Initiative	66.00	66.00
Graduate and Professional Student Health Insurance Fee	1,371.00	1,371.00
Professional School Fee	4,000.00	4,000.00
TOTAL PUBLIC HEALTH STUDENT FEES	\$ 12,959.50	\$ 25,471.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

IRVINE -- Undergraduate Students

Annual Fees

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Associated Students Fee	54.00	54.00
University Center Fee	142.50	142.50
Recreation Center/Athletic Facilities Improvement Fee	264.00	264.00
Campus Spirit Fee	99.00	99.00
Bren Events Center Fee	69.00	69.00
	<hr/>	
Total Campus-Wide Fees (w/o insurance)	\$ 6,769.50	\$ 24,589.50
Student Health Insurance	\$ 705.00	\$ 705.00
	<hr/>	
Total Campus-Wide Fees (w/o insurance)	\$ 7,474.50	\$ 25,294.50

IRVINE -- Graduate Students

Annual Fees

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Associated Graduate Students Fee	27.00	27.00
University Center Fee	142.50	142.50
Bren Events Center Fee	69.00	69.00
Recreation Center/Athletic Facilities Improvement Fee	264.00	264.00
Graduate and Professional Student Health Insurance Fee	1,995.00	1,995.00
	<hr/>	
Total Campus-Wide Fees	\$ 9,394.50	\$ 24,355.50

IRVINE -- MBA Students

Annual Fees

	MBA	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Associated Graduate Students Fee	42.00	42.00
University Center Fee	142.50	142.50
Bren Events Center Fee	69.00	69.00
Recreation Center/Athletic Facilities Improvement Fee	264.00	264.00
Graduate and Professional Student Health Insurance Fee	1,995.00	1,995.00
	<hr/>	
Professional School Fee	\$ 14,922.00	\$ 14,276.00
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TOTAL MBA STUDENT FEES	24,226.50	35,825.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Request for Quotation for Private Loans for UC Students

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)**IRVINE -- Medical Students (6)**

Annual Fees		Medicine
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee		735.00 735.00
Educational Fee		6,057.00 6,057.00
Associated Graduate Students Fee		57.00 57.00
University Center Fee		142.50 142.50
Bren Events Center Fee		69.00 69.00
Recreation Center/Athletic Facilities Improvement Fee		264.00 264.00
Graduate and Professional Student Health Insurance Fee		1,995.00 1,995.00
Disability Insurance Fee for Medical School Students		61.00 61.00
Special Fee for Medical School Students		376.00 376.00
Professional School Fee		\$ 13,064.00 \$ 13,064.00
TOTAL MEDICAL STUDENT FEES		22,820.50 35,065.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

LOS ANGELES -- Undergraduate Students

Annual Fees

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Ackerman Student Union Fee	7.50	7.50
USA Fee	119.73	119.73
Wooden Recreational Center Fee	39.00	39.00
Student Programs, Activities, and Resources Center Fee	84.00	84.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
 Total Campus-Wide Fees (w/o insurance)	 \$ 6,504.23	 \$ 24,324.23
 Student health Insurance	 \$ 558.00	 \$ 558.00
 Total Campus-Wide Fees (with insurance)	 \$ 7,062.23	 \$ 24,882.23

LOS ANGELES -- Graduate Students

Annual Fees

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Student Programs, Activities, and Resources Center Fee	84.00	84.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Mandatory Medical Insurance	930.00	930.00
 Total Campus-Wide Fees	 \$ 8,109.50	 \$ 23,070.50

LOS ANGELES - Dental Students

Annual Fees

	Dentistry	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities, and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00
Disability Insurance Fee for Dental School Students	72.00	72.00
 Total Campus Fees	 \$ 8,076.50	 \$ 20,321.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Materials Fee	\$ 1,182.00	\$ 1,182.00
Professional School Fee	15,445.00	13,523.00
Total Dental Student Fees	24,703.50	35,026.50

LOS ANGELES -- Law Students

Annual Fees

	Law	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities, and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00
Materials Fee	600.00	600.00
Special Fee for Law School Students	376.00	376.00
Professional School Fee	\$ 15,600.00	\$ 14,319.00
Total Law Student Fees	24,580.50	35,544.50

LOS ANGELES - MBA Students

Annual Fees

	MBA	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
MBA Activities Fee	75.00	75.00
Wooden Recreational Center Fee	39.00	39.00
Student Programs, Activities and Resources Center Fee	84.00	84.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Mandatory Medical Insurance	930.00	930.00
Course Materials Fee	\$ 975.00	\$ 975.00
Professional School Fee	16,984.00	14,276.00
Total MBA Student Fees	\$ 26,038.50	\$ 35,575.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

LOS ANGELES -- Medical Students (5)

Annual Fees	Medicine	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00
Disability Insurance Fee for Medical School Students	61.00	61.00
Special Fee for Medical School Students	376.00	376.00
Professional School Fee	13,064.00	13,064.00
Total Medical School Student Fees	21,505.50	33,750.50

LOS ANGELES - Nursing Students

Annual Fees	Nursing	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00
Professional School Fee	3,149.00	3,149.00
Total Nursing Student Fees	\$ 11,153.50	\$ 23,398.50

LOS ANGELES -- Theater, Film, & Television Students (MFA)

Annual Fees	TFT	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00
Professional School Fee	5,959.00	5,959.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Total TFT (MFA) Student Fees **\$ 13,963.50 \$ 26,208.50**

LOS ANGELES -- Public Policy (MPP)

Annual Fees

	MPP	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00

Professional School Fee **4,000.00 4,000.00**

Total Public Policy Student Fees **\$ 12,109.50 \$ 24,621.50**

LOS ANGELES -- Public Health (MPH, DrPH, Denv)

Annual Fees

	Public Health	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Ackerman Student Union Fee	7.50	7.50
GSA Fee	39.00	39.00
Wooden Recreational Center Fee	39.00	39.00
Seismic Fee for Ackerman/Kerckhoff	113.00	113.00
Student Programs, Activities and Resources Center Fee	84.00	84.00
Mandatory Medical Insurance	930.00	930.00

Professional School Fee **4,000.00 4,000.00**

Total Public Health Student Fees **\$ 12,109.50 \$ 24,621.50**

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

MERCED -- Undergraduate Students

Annual Fees

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Associated Students Fee	20.00	20.00
Recreation Fee	292.00	292.00
Transportation Fee	70.00	70.00
Health Services Fee	100.00	100.00
Student Life Fee	30.00	30.00
Total Campus-Wide Fees (w/o insurance)	\$ 6,653.00	\$ 24,473.00
Student Health Insurance	<u>\$ 670.00</u>	<u>\$ 670.00</u>
Total Campus-Wide Fees (w/o insurance)	\$ 7,323.00	\$ 25,143.00

MERCED -- Graduate Students

Annual Fees

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Associated Students Fee	20.00	20.00
Recreation Fee	292.00	292.00
Transportation Fee	70.00	70.00
Health Services Fee	100.00	100.00
Student Life Fee	30.00	30.00
Student Health Insurance	<u>\$ 1,500.00</u>	<u>\$ 1,500.00</u>
Total Campus-Wide Fees (w/o insurance)	\$ 8,909.00	\$ 23,870.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

RIVERSIDE -- Undergraduate Students

Annual Fees

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$ --	\$17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Associated Students Fee	37.50	37.50
KUCR fee	9.00	9.00
Associated Students' Program Board Fee	30.00	30.00
Educational Opportunity Program Fee	4.50	4.50
UCSA Fee	2.25	2.25
Highlander Fee	6.00	6.00
Student Services Fee	18.00	18.00
Student Center (Commons) Fee	60.00	60.00
Division I Scholarship Fee	105.00	105.00
Recreation Center Fee	177.00	177.00
Total Campus-Wide Fees (w/o insurance)	\$6,590.25	\$24,410.25
Student Health Insurance	\$660.00	\$660.00
Total Campus-Wide Fees (with insurance)	\$7,250.25	\$25,070.25

RIVERSIDE -- Graduate Students

Annual Fees

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$ --	\$14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Graduate Student Association Fee	60.00	60.00
Student Services Fee	18.00	18.00
Student Center (Commons) Fee	60.00	60.00
Recreation Center Fee	177.00	177.00
Graduate and Professional Student Health Insurance Fee	1,554.00	1,554.00
Total Campus-Wide Fees	\$8,766.00	\$23,727.00

RIVERSIDE -- MBA Students

Annual Fees

	MBA	
	Resident	Nonresident
Nonresident Tuition	\$ --	\$12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Graduate Student Association Fee	60.00	60.00
Student Services Fee	18.00	18.00
Student Center (Commons) Fee	60.00	60.00
Recreation Center Fee	177.00	177.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Graduate and Professional Student Health Insurance Fee	1,554.00	1,554.00
Professional School Fee	14,276.00	14,276.00
Total MBA Student Fees	22,937.00	35,182.00

RIVERSIDE -- Medical Students

Annual Fees

	Medicine	
	Resident	Nonresident
Nonresident Tuition	\$ --	\$12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Graduate Student Association Fee	60.00	60.00
Student Services Fee	18.00	18.00
Student Center (Commons) Fee	60.00	60.00
Recreation Center Fee	177.00	177.00
Graduate and Professional Student Health Insurance Fee	1,554.00	1,554.00
Disability Insurance Fee for Medical School Students	61.00	61.00
Special Fee for Medical School Students	376.00	376.00
Professional School Fee	13,064.00	13,064.00
Total Medical School Student Fees	22,162.00	34,407.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

SAN DIEGO -- Undergraduate Students

Annual Fees	Undergraduate	
	Resident	Nonresident
Nonresident Tuition		\$17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Campus Activity Fee	63.00	63.00
University Center Fee	112.50	112.50
Intercollegiate Athletics Student Activity Fee	92.10	92.10
Recreation Facility Fee	276.00	276.00
Total Campus-Wide Fees * (w/o insurance)	\$6,684.60	\$24,504.60
Student Health Insurance (waivable for residents) #	\$633.00	\$633.00
Total Campus-Wide Fees * (with insurance)	\$7,317.60	\$25,137.60

Foreign UG students are required to purchase insurance at graduate rate.

* Add \$15 per year for Eleanor Roosevelt students.

* Add \$6 per year for Thurgood Marshall students.

*Add \$21 per year for Muir students.

*Add \$21 per year for Revelle students.

*Add \$24 per year for Sixth College students.

*Add \$12 per year for Warren College students.

SAN DIEGO -- Graduate Students

Annual Fees	Graduate	
	Resident	Nonresident
Nonresident Tuition		\$14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
University Center Fee	112.50	112.50
Recreational Facility Fee	276.00	276.00
Graduate Student Association Fee	36.00	36.00
Graduate and Professional Student Health Insurance Fee	1,290.00	1,290.00
Total Campus-Wide Fees	\$8,611.50	\$23,572.50

SAN DIEGO -- Medical Students

Annual Fees	Medicine	
	Resident	Nonresident
Nonresident Tuition		\$12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
University Center Fee	112.50	112.50
Recreational Facility Fee	276.00	276.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Request for Quotation for Private Loans for UC Students

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Graduate Student Association Fee	36.00	36.00
Graduate and Professional Student Health Insurance Fee	1,290.00	1,290.00
Disability Insurance Fee for Medical School Students (collected fall only)	61.00	61.00
Special Fee for Medical School Students	376.00	376.00
Professional School Fee	13,064.00	13,064.00
Total Medical Student Fees	22,007.50	34,252.50

SAN DIEGO -- Pharmacy Students**Annual Fees**

	Pharmacy	
	Resident	Nonresident
Nonresident Tuition		\$12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
University Center Fee	112.50	112.50
Recreational Facility Fee	276.00	276.00
Graduate Student Association Fee	36.00	36.00
Graduate and Professional Student Health Insurance Fee	1,290.00	1,290.00
Professional School Fee	10,849.00	10,849.00
Total Pharmacy School Fees	\$19,355.50	\$31,600.50

SAN DIEGO -- MBA Students**Annual Fees**

	MBA	
	Resident	Nonresident
Nonresident Tuition		\$12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
University Center Fee	112.50	112.50
Recreational Facility Fee	276.00	276.00
Graduate Student Association Fee	36.00	36.00
Graduate and Professional Student Health Insurance Fee	1,290.00	1,290.00
Professional School Fee	14,276.00	14,276.00
Total MBA Student Fees	\$22,782.50	\$35,027.50

SAN DIEGO -- MPIA IRPS Students**Annual Fees**

	MBA	
	Resident	Nonresident
Nonresident Tuition		\$12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
University Center Fee	112.50	112.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Request for Quotation for Private Loans for UC Students

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Recreational Facility Fee	276.00	276.00
Graduate Student Association Fee	36.00	36.00
Graduate and Professional Student Health Insurance Fee	1,290.00	1,290.00
	<hr/>	
Professional School Fee	4,000.00	4,000.00
Total MPIA IRPS Student Fees	\$12,611.50	\$25,123.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

SAN FRANCISCO -- Graduate Academic Students

Annual Fees

	Graduate Academic	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Millberry Student Union Fee	129.00	129.00
Associated Students Fee	33.00	33.00
Student Health Insurance Fee	1,840.00	1,840.00
Total Campus-wide Fees	\$ 8,899.00	\$ 23,860.00

San Francisco -- Graduate (Other) Professional Students

Annual Fees

	Graduate Professional	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Millberry Student Union Fee	129.00	129.00
Associated Students Fee	33.00	33.00
Student Health Insurance Fee	1,840.00	1,840.00
Total Campus-wide Fees	\$ 8,899.00	\$ 23,860.00

Doctorate in Physical Therapy Science

Add Materials Fee of \$250

Additional health insurance charge of \$429

San Francisco -- Dental Students

Annual Fees

	Dentistry	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Millberry Student Union Fee	129.00	129.00
Student Health Insurance Fee	1,840.00	1,840.00
Associated Students Fee	51.00	51.00
Disability Insurance Fee for Dental School Students (collected fall only)	72.00	72.00
Dental Instruments and Supply Costs	See campus website	
Professional School Fee	15,443.00	15,443.00
Total Dental Student Fees	24,327.00	36,572.00

San Francisco -- Medical Students

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Annual Fees	Medicine	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Millberry Student Union Fee	129.00	129.00
Associated Students Fee	51.00	51.00
Medical Student Association Fee	15.00	15.00
Student Health Insurance Fee	1,840.00	1,840.00
Disability Insurance Fee for Medical School Students	61.00	61.00
Special Fee for Medical School Students	376.00	376.00
Professional School Fee	13,064.00	13,064.00
Total Medical School Student Fees	22,328.00	34,573.00

SAN FRANCISCO - Nursing Students (MS)

Annual Fees	Nursing	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Millberry Student Union Fee	129.00	129.00
Graduate Student Association Fee	33.00	33.00
Nursing Student Council Fee	15.00	15.00
Student Health Insurance Fee	1,840.00	1,840.00
Professional School Fee	3,149.00	3,149.00
Total Nursing Student Fees	\$ 11,958.00	\$ 24,203.00

SAN FRANCISCO - Pharmacy Students

Annual Fees	Pharmacy	
	Resident	Nonresident
Nonresident Tuition	\$	\$ 12,245.00
University Registration Fee	735.00	735.00
Educational Fee	6,057.00	6,057.00
Millberry Student Union Fee	129.00	129.00
Associated Students Fee	51.00	51.00
Pharmacy Student Association	21.00	21.00
Student Health Insurance Fee	1,840.00	1,840.00
Professional School Fee	10,849.00	10,849.00
Total Pharmacy Student Fees	\$ 19,682.00	\$ 31,927.00

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Request for Quotation for Private Loans for UC Students

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)**SANTA BARBARA -- Undergraduate Students****Annual Fees**

	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Associated Students Fee (incl Bike Path Maintenance, Parking, Progr Board & Women's Comm)	99.69	99.69
Passthrough Fees:		
Associated Students Fee -- Disabled Student Services Fee	5.25	5.25
Associated Students Fee -- Intramural Sports Fee	7.50	7.50
Associated Students Fee -- Multicultural Center Fee	2.25	2.25
Assoc Sts Fee --Children's Center Fee	9.00	9.00
Assoc Sts Fee -- Student Health Fee	36.00	36.00
Student Health Services	21.00	21.00
University Center Fee	45.00	45.00
Recreation Center/Aquatics Complex/University Center Expansion Fee	134.10	134.10
RecCen Expansion Fee	103.50	103.50
Intercollegiate Athletics Facility Fee	102.09	102.09
Events Center Fee	12.00	12.00
Transit System Fee	28.14	28.14
Intercollegiate Athletic Scholarship Fee	27.00	27.00
Orafalea University Children's Center Fee	9.00	9.00
Shoreline Fee	9.00	9.00
Women's Center Fee	12.75	12.75
Arts and Lectures Fee	6.00	6.00
Additional Multicultural Center Fee	5.25	5.25
Student Life Program Fee	5.25	5.25
Broida Bike Path Initiative	9.00	9.00
Campus Learning Assistance Services Fee	18.00	18.00
Students Resources Building Fee	99.99	99.99
Counseling and Career Services Fee	17.55	17.55
Student Medical Emergency Relief Fund Fee	2.67	2.67
Educational Opportunity Fee	8.25	8.25
Recreational Sports Fee	856.23	21.00
Total Campus-Wide Fees (w/o insurance)	\$6,997.23	\$24,817.23
Student Health Insurance	627.00	\$627.00
Total Campus-Wide Fees (with insurance)	\$7,624.23	\$25,444.23

SANTA BARBARA -- Graduate Students**Annual Fees**

	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Graduate Students Association Fee	28.50	28.50

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Request for Quotation for Private Loans for UC Students

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

Bicycle System Improvement Fee	2.25	2.25
Multicultural Center Fee	5.25	5.25
Children's Center Fee	18.00	18.00
University Center Fee	18.00	18.00
Recreation Center/Aquatics Complex/ University Center Expansion Fee	134.10	134.10
Transit System Fee	28.14	28.14
Shoreline Fee	9.00	9.00
Student Health Fee	99.00	99.00
Women's Center Fee	12.75	12.75
Disabled Students Program Fee	3.00	3.00
Night and Weekend Parking Fee	9.99	9.99
Recreational Sports Fee	21.00	21.00
Arts and Lectures Fee	6.00	6.00
RecCen Expansion Fee	103.50	103.50
Broida Bike Path Initiative	9.00	9.00
Students Resources Building Fee	99.99	99.99
Counseling and Career Services Fee	17.55	17.55
Student Medical Emergency Relief Fund Fee	2.67	2.67
Graduate and International Student Accident & Health Insurance Fee	1,597.95	1,597.95
	2,225.64	
Total Campus-Wide Fees	\$9,122.64	\$24,083.64

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

Attachment G: 2005-06 Tuition and Fees (State Supported Programs)

SANTA CRUZ -- Undergraduate Students

Annual Fees	Undergraduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$17,304.00
University Registration Fee	735.00	735.00
Educational Fee	5,406.00	5,922.00
Campus Programs Fee	6.00	6.00
College Student Government Fee	30.00	30.00
Student Facilities Fee	90.00	90.00
Student Life Facilities Fee	90.00	90.00
Transportation Fee	207.00	207.00
OPERS Fitness Facilities Fee	45.00	45.00
Free/Anonymous HIV Testing Fee	2.25	2.25
Campus Childcare Fee	24.00	24.00
Class Schedule Fee	1.10	1.10
Student Programs Fee (Measure 7)	153.00	153.00
Campus Sustainability Program Fee	18.00	18.00
Engaging Education Program Fee	12.60	12.60
Theater Arts Fee	6.00	6.00
Campuswide Student Government Fee	21.00	21.00
Community and Resource Empowerment	15.00	15.00
Student Voice and Empowerment	2.25	2.25
Student Media Council Fee	9.60	9.60
Seismic/Life Safety Fee	75.00	75.00
Total Campus-Wide Fees (w/o insurance)	\$6,948.80	\$24,768.80
Health Insurance (waivable)	\$ 654.00	\$ 654.00
Total Campus-Wide Fees (with insurance)	\$7,602.80	\$25,422.80

Annual Fees	Graduate	
	Resident	Nonresident
Nonresident Tuition	\$	\$14,694.00
University Registration Fee	735.00	735.00
Educational Fee	6,162.00	6,429.00
Campus Programs Fee	6.00	6.00
College Student Government Fee	30.00	30.00
Student Facilities Fee	96.00	96.00
Student Life Facilities Fee	90.00	90.00
Transportation Fee	207.00	207.00
OPERS Fitness Facilities Fee	45.00	45.00
Free/Anonymous HIV Testing Fee	2.25	2.25
Campus Childcare Fee	24.00	24.00
Student Programs Fee (Measure 7)	153.00	153.00
Seismic/Life Safety Fee	75.00	75.00
Graduate Student Health/Dental/Vision Insurance Fee	1,811.76	1,811.76
Total Campus-Wide Fees	\$9,437.01	\$24,398.01

Note: Some programs, such as medicine and dentistry, charge different fee levels, depending on which year in the program the student is enrolled. These different fee levels are not reflected in these charts.

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment G1: 2005-06 Fees for Self-Supporting Programs

Campus	Program Name	Effective	2005-06 Fees (new students)	Total Cost	Program Length	FT/PT	Degree Goal	Location	Features	CSS Code
Berkeley	Berkeley-Columbia Executive MBA Program	Spring 2002	\$65,000 Berkeley portion	\$130,000	19 months (May-December)	part-time	MBA	joint	Classes meet Thursday-Saturday every three weeks.	'1C1'
Berkeley	Haas School Evening-Weekend MBA Program	1972	\$26,000 annual fee	\$78,000	3 years	part-time	MBA		Choice of evening or Saturday classes, weekend classes offered both at Berkeley and Silicon Valley	'1E1'
Berkeley	Masters of Financial Engineering (MFE) Program	April 2001	\$42,000 annual fee (spring 2006)	\$42,000	1 year (March-March)	full-time	MFE		Three 8-week sessions and one 22-week session.	'1F1'
Berkeley	Master of Laws (LLM)				1 year	full-time	LLM		Primarily for foreign-trained law professionals.	
Davis	Master of Laws (LLM)	Fall 2005	\$26,000 annual fee	\$26,000	1 year	full-time	LLM		Primarily for foreign-trained law professionals.	
Davis	MAS in Maternal and Child Nutrition	Fall 2005	\$400 per unit (36 required)	\$14,400	up to 3 years	part-time	MAS		Evening courses.	
Davis	Master of International Commercial Law	Summer 2001	\$6,500 per session (3 required)	\$19,500	3 years (summers only)	part-time	MA		Students participate in three six-week sessions.	'50A'
Davis	Master of Science in Forensic Science	Fall 2001	\$625 per unit (32 required)	\$20,000	2 or 3 years	either	MS			'55A'
Davis	Working Professional MBA Program	Fall 1994	\$2,400 or \$3,000 per course (24)	\$57,600 - \$72,000	2-4 years	part-time	MBA		Davis and San Ramon locations, evening and weekend classes.	'921'
Irvine	Executive MBA Program (EMBA)	1984	\$67,500 program	\$67,500	2 years (7)	full-time	MBA		Classes meet Friday and Saturday every other week.	'364'
Irvine	Fully Employed MBA Program (FEMBA)	1991	\$63,900 program	\$63,900	3 years	part-time	MBA		Classes offered during evenings and weekends.	'602'
Irvine	Health Care Executive MBA Program (HCEMBA)	1985	\$67,500 program fee	\$67,500	2 years (including)	full-time	MBA		Classes held once per month, Thursday – Sunday.	'764'
Irvine	MAS in Criminology, Law and Society	Fall 2003	\$10,836 annual fee	\$21,672	2 years	full-time	MAS	online	Fully on-line, with one five-day in-residence course required.	22B'
Los Angeles	Educational Leadership Program (EdD)	Fall 1993	\$15,625 annual fee	\$46,875	40 months	part-time	EdD		Classes held one night a week and altering Saturdays (1-3 per month).	'659'
Los Angeles	Executive MBA Program (EMBA)	1981	\$41,400 annual fee	\$82,800	2 years	full-time	MBA		Classes held every other weekend (Fridays and Saturdays), with on-campus residence provided.	'364'
Los Angeles	Fully Employed MBA Program (FEMBA)	1988	\$25,500 annual fee	\$76,500	3 years	part-time	MBA		Courses offered weekdays, evenings, and Saturdays.	'602'
Los Angeles	Master of Laws (LLM)		\$35,000 annual fee	\$35,000	1 year	full-time	LLM		Primarily for foreign-trained law professionals.	
Los Angeles	Master of Public Health for Health Professionals (MPHHP)	1995	\$18,000 annual fee	\$36,000	2 years	part-time	MPH		Coursework and projects are scheduled on weekends and during the summer months.	'793'
Los Angeles	Professional Program for International Dentists (PPID)	June 2002	\$48,510 annual fee	\$97,020	2 years, plus prior summer	full-time	DDS		For qualified foreign-trained dentists; students integrate into existing third- and fourth-year programs.	'555'
Los Angeles	UCLA-NUS Executive MBA	Fall 2004	\$25,000 annual fee	\$88,000 (US\$54,000)	15 months	part-time	MBA	joint	Dual degree program with residential sessions in Singapore, Los Angeles and Shanghai.	'36S'
Los Angeles	Master of Financial Engineering		\$35,000 program fee	\$35,000	1 year (January-December)	full-time	MFE			
Riverside	Master of Fine Arts in Writing Program	Fall 2005	\$9,950 annual fee	\$29,850	3 years	part-time	MFA	offsite	Offered at the Desert Campus, beginning fall 2005.	
San Diego	FlexMBA Program	Fall 2004	\$36,000 annual fee	\$72,000	2 years (including)	full-time	MBA		Classes meet Friday and Saturday every other week.	921'
San Diego	MAS in Leadership in Health Care Organizations	Winter 2001	\$550 per unit (36 required)	\$25,000	1-3 years	either	MAS		Courses offered afternoons, evenings and weekends.	'65A'
San Diego	MAS in Marine Biodiversity and Conversation	Summer 2004	\$550 per unit (36 required)	\$26,000	1 year (including summer)	full-time	MAS			53B'
San Diego	MAS in Clinical Research	Spring 2003	\$550 per unit (48 required)	\$25,000	2-3 years	part-time	MAS			'563'
San Francisco	International Dentist Program (IDP)	2001-02	\$53,500 annual fee	\$107,000	2 years, plus prior summer	full-time	DDS		For qualified foreign-trained dentists; students integrate into existing third- and fourth-year programs.	'555'
San Francisco	MAS in Clinical Research	Summer 2002	\$17,000 annual fee	\$34,000	2 years	part-time	MAS		For advanced pre-doctoral students, post-doctoral fellows, and faculty members.	'563'
San Francisco	Masters Entry Program in Nursing (MEPN)	Fall 2005	\$27,000 annual fee	\$27,000	1 year (four quarters)	full-time	MSN		For persons with a non-nursing B.S. or B.A. degree and new to the nursing profession. Only first year of three-year programs is self-supporting and requires self-supporting	
San Francisco	UCSF/SFSU Joint Doctorate in Physical Therapy (DPT)	Fall 2004	\$18,000 annual fee	\$18,000	1 year	full-time	DPT	joint	Combined MS-DPT three-year program (of which only the third year is self-supporting, or one-year program for licensed physical therapists.	66D'
Santa Cruz	Master's in Computer Engineering - Network Engineering	Fall 1997	\$2,750 per course (9 required)	\$24,750	2.5 to 3.5 years	part-time	MS	offsite	Courses offered at Cupertino site, afternoons and evenings.	'421'

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment H

CAMPUS OFFICES AND STUDENTS SERVED

Campus	Office	Students Served
UCB	Boalt Financial Aid Office	Law students
UCB	Haas School of Business Financial Aid Office	Full-time MBA students, students in the self-supporting Evening and Weekend MBA Program, and Masters of Financial Engineering Program
UCB	central campus Financial Aid Office	All other students: undergraduates, including those in Business; graduate academics, including business Ph.D students; and Optometry students
UCD	Law School Financial Aid Office	Law students
UCD	School of Medicine Financial Aid Office	Medical students
UCD	central campus Financial Aid Office	All other students: undergraduates, graduate academics, and students in the Graduate School of Management, School of Education, and Veterinary Medicine School
UCI	Paul Merage School of Business	Business students
UCI	School of Medicine	Medical students
UCI	central campus Financial Aid & Scholarships office	All other students
UCLA	central campus Financial Aid Office	Undergraduates, graduate academics
UCLA	Law School	Law students
UCLA	School of Dentistry	Dentistry students
UCLA	School of Nursing	Nursing students
UCLA	Anderson School of Management: two offices	one office for regular students; one office for fully employed MBA programs
UCLA	Geffen School of Medicine	Medical students
UCR	central campus Financial Aid Office	All students
UCM	central campus Financial Aid & Scholarships office	All students
UCSF	Student Financial Services Office	All students
UCSD	Medical School	Medical students; pharmacy students
UCSD	central campus Financial Aid Office	All other students
UCSB	central campus Financial Aid Office	All students
UCSC	central campus Financial Aid Office	All students

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment I

CAMPUS DISBURSEMENT NEEDS

Campus	Student populations to be identified as distinct groups	To what office should the funds/checks be sent?	Checks or EFT?	If checks, made payable to whom?
UCB	Law, Business, Graduate, Undergraduate, Everything Else	central campus Financial Aid Office	ELM/NDN EFT	n/a
UCD	Law, Med, Undergraduates, All Others	Student Accounting Office	Currently ELM EFT's funds to the NDN and they in turn send a check to Student Accounting Office. In the future, we would like to receive disbursements via EFT.	Copayable: Student and The Regents
UCI	Business, Medicine, All Others	central campus Financial Aid and Scholarships Office; for med students, to School of Medicine; for business students, to Graduate School of Management	checks per individual student	student or The Regents, but not copayable
UCLA	Undergraduate, Graduate, Law, Business, Medical, Dental, Nursing	Student Loan Services	OpenNet File Management System (FMS); Sallie Mae consolidated EFT	n/a
UCR	(none needed)	Financial Aid Office	Currently receiving checks but hopes to migrate to ELM/NDN EFT	Copayable: Student and The Regents
UCM	Undergraduate, Graduate	Student Business Services Office	ELM/NDN EFT	n/a
UCSF	(none needed)	Student Financial Services Office	Currently receiving checks but hopes to migrate to EFT disbursements	Student only
UCSD	Med, All Others	Student Business Services Office	Currently receiving checks but plans to change to EFT disbursements	Copayable: Student and The Regents
UCSB	(none needed)	Financial Aid Office	Checks	Copayable: Student and The Regents
UCSC	(none needed)	Financial Aid Office	ELM/NDN EFT	n/a

APR CALCULATION ASSUMPTIONS

- Length of Term, Interest Rate, Grace Period, Capitalization Frequency, Origination and/or Repayment Fees reviewed.
- Accrued interest prior to repayment is based on the average time until loan enters repayment (Average Time) plus the Grace Period as defined by each product. The average time assumptions for each discipline are as follows:
 - Business = 15 months
 - Law = 21 Months
 - Health Professions/Other = 27 Months

Example: if the loan product is intended for a Law student and has a 9 month grace period, interest would accrue for 30 months (21 month average time assumption for a Law student loan plus the 9 month grace period).

- Accrued interest prior to repayment is calculated on the principal amount and origination fee if applicable. Frequency dependent on loan terms:
 - Capitalization at repay: simple interest is calculated monthly
 - Capitalization quarterly: compound interest quarterly
 - Capitalization monthly: compound interest monthly
- Origination fee accrues interest at the time of disbursement and is amortized over the term of the loan beginning at repayment.
- Repayment fee is amortized over the term of the loan beginning at repayment.
- Entire loan amount is disbursed on day 1 of first month
- The APR calculation is based on monthly cashflows.
- Interest rate benchmarks will be based on the rates as of 11/09/2005: 3 Month LIBOR as of 11/09/2005 = 4.32%, WSJ Prim as of 11/09/2005 = 7.00%

UNIVERSITY OF CALIFORNIA
Request for Quotation for Private Loans for UC Students
Attachment K

APR CEILINGS

Discipline or Group	APR Ceiling*
Business	6.689484417439%
Law	6.637835800648%
Health Professions	6.682126820087%
Other	6.849646866322%

*Based on interest rates as of November 9, 2005.

REPORT NEEDS AND SAMPLES

OVERVIEW: Unless otherwise specified, the reports requested in this RFQ should be at the Discipline or Group level with campus level detail and totals. For example, the report with the Business student discipline data should provide data on each campus's Business students with a systemwide aggregate. Similarly, the report with Law student discipline data should provide data and totals separately for UCB, UCD, and UCLA, with a systemwide total for those three campuses.

On a monthly frequency, the lender should provide a summary report of the loans approved during the reporting period (see Sample Report 1).

On a quarterly frequency, the lender should provide a summary report of the private loan portfolio, based on the loans students received while attending UC (see Sample Report 2).

The reports should be available to the campuses within five business days from the end of the reporting period.

At a minimum, the lender should send the reports to the designated University staff (both at the campus/program and at the Office of the President) as an Excel spreadsheet email attachment, imbedded in an email message, as an electronic report that is downloadable from a secure website with an email notification of the reports' availability, or as an electronic report that is downloadable from a secure website that is available based on a pre-established schedule which eliminates the need for an email notification.

UNIVERSITY OF CALIFORNIA
 Request for Quotation for Private Loans for UC Students
Attachment L

SAMPLE REPORT 1 - SUMMARY OF APPROVED LOANS

UNIVERSITY OF CALIFORNIA

For the period: December 1, 2005 - December 31, 2005

Discipline: Law

Campus	Cosigner?	Credit Worthy		Credit Ready		Low Credit		Poor Credit		Consolidation Loan	
		# of Borrowers	Loan Amount	# of Borrowers	Loan Amount	# of Borrowers	Loan Amount	# of Borrowers	Loan Amount	# of Borrowers	Loan Amount
UCB	Yes										
	No										
Subtotal		0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -
UCD	Yes										
	No										
Subtotal		0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -
UCLA	Yes										
	No										
Subtotal		0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -
UC System	Yes	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -
	No	0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -
Total		0	\$ -	0	\$ -	0	\$ -	0	\$ -	0	\$ -

VENDOR RESPONSE FORM 1: APR INFORMATION & PROPOSED LOAN TERMS

Lender:

Targetted Discipline or Group:

	Credit Worthy (671 or higher)	Credit Ready (670-610)	Low Credit (609 - 570)	Poor Credit (569 or less)
NAME OF LOAN PROGRAM				

FACTORS USED IN CALCULATING APR				
1.	Origination Fee Amount (specify fixed amount or percentage of what)			
2.	Origination Fee Assessment (specify when the fee is assessed, e.g., at disbursement by term, at repayment after interest capitalization, at repayment before interest capitalization, etc.)			
3.	Guarantee Fee Amount (specify fixed amount or percentage of what)			
4.	Guarantee Fee Assessment (specify when the fee is assessed)			
5.	Other Loan Fee(s) (specify what the fee is for and the amount--identifying whether it is a fixed amount or percentage of what)			
6.	Other Loan Fee(s) Assessment (specify when each fee is assessed)			
7.	a. Enrolled & Grace Interest Rate Benchmark Calculation (e.g., 3-month LIBOR + 1.75)			
8.	b. In Repayment Interest Rate Benchmark Calculation (e.g., 3-month LIBOR + 2.25)			
9.	Variable or Fixed Interest Rate?			
10.	Length of Grace Period			

VENDOR RESPONSE FORM 1: APR INFORMATION & PROPOSED LOAN TERMS

Lender:

Targetted Discipline or Group:

11.	Frequency and Timing of Interest Capitalization, e.g., once at repayment, annually after each interim period, etc.				
12.	Maximum Repayment Term (not including periods while student is enrolled and during grace), e.g., 20 years				
13.	Describe any additional loan terms that affect borrower cost.				

ADDITIONAL LOAN TERMS					
1.	Specify provision(s) for "Interim Periods" (no repayments required) for other than periods of enrollment at UC and grace period, e.g., while enrolled at another school at least half time, while serving a medical internship, etc.				
2.	For each provision listed above, specify maximum length of "Interim Period" (no repayments required) and any other relevant restrictions.				
3.	Interim Periods & Repayment Term - Do interim periods extend the repayment term? (Yes or No)				
4.	Specify Provisions for Interest-Only Payments, e.g., while experiencing financial hardship				
5.	Length of Interest-Only Payments - specify maximum, aggregate length of time that interest-only payments can be made and any other relevant restrictions				

VENDOR RESPONSE FORM 1: APR INFORMATION & PROPOSED LOAN TERMS

Lender:

Targetted Discipline or Group:

6.	Interest-Only Payments & Repayment Term - Do periods during which interest-only payments are being made extend the repayment term?				
7.	Are there any other repayment provisions available to assist borrowers who are experiencing temporary financial difficulty? If so, please describe what they are and the length of time they are available.				
8.	Annual Loan Minimum				
9.	Annual Loan Maximum				
10.	Cumulative Loan Limit				
11.	Is there an interest rate cap? If so, what is it?				
12.	Is there an interest rate floor? If so, what is it?				
13.	Describe any additional loan terms not covered elsewhere on this form.				

BACK-END BENEFITS

1.	Cosigner Release Provision - specify if one is available and if so the terms				
2.	Percent of Cosigners Who Qualify for the Release Provision - In the last 12-month period, how many and what percent of cosigners qualified for this provision?				
3.	Description of Borrower Back-End Benefits - Please describe any benefits that reduce the cost of the loan and for which the borrower is eligible to receive during or after the grace period.				

VENDOR RESPONSE FORM 1: APR INFORMATION & PROPOSED LOAN TERMS

Lender:

Targetted Discipline or Group:

4.	Requirements to Receive the Back-End Benefit - Please describe the criteria that must be met in order to be receive the back-end benefit.				
5.	If a certain number of on-time payments are required, do "interim periods" or agreed-upon interest-only payments make the borrower ineligible to receive the back-end benefit?				
6.	Describe any other factors that disqualify a borrower from receiving the back-end benefits.				
7.	Percent of Borrowers Who Qualify for the Back-End Benefits - In the last 12-month period, how many and what percent of borrowers received the back-end benefit(s)?				
8.	Describe any other back-end benefits for which the borrower may be eligible.				

VENDOR RESPONSE FORM 2: APPLICATION & LOAN PROCESSING

Lender:

Targetted Discipline or Group:

APP & LOAN PROCESSING	
1.	Briefly describe how the borrower is authenticated for purposes of the electronic signature and whether that authentication process involves the campus providing student-level data to the lender.
2.	Once the borrower has submitted the application, what is the typical borrower wait time until the borrower knows for what loan terms he/she qualifies?
3.	Once an application is submitted to the lender, how long will it typically take for the funds to be sent to the school?
4.	Is an online procedure provided to the borrower to monitor the status of the borrower's loan, e.g., beginning with the processing of the loan application and continuing until the loan funds have been sent to the school? (Yes or No)

VENDOR RESPONSE FORM 2: APPLICATION & LOAN PROCESSING

Lender:

Targetted Discipline or Group:

APP & LOAN PROCESSING	
5.	If an online procedure is provided to the borrower to monitor his/her loan process, please describe the type of information available to the borrower and the frequency with which the information is updated (e.g., real-time updates, nightly updates, etc.)
6.	If there is no online procedure provided to the borrower to monitor his/her loan process, please describe the process(es) by which the borrower can obtain information to monitor his/her loan as it is being processed.
7.	Is an online means provided to the school to monitor the loan process for a specific student? (Yes or No)

VENDOR RESPONSE FORM 2: APPLICATION & LOAN PROCESSING

Lender:

Targetted Discipline or Group:

APP & LOAN PROCESSING	
8.	<p>If an online procedure is provided to the school to monitor a specific student's loan process, please describe the type of information available and the frequency with which the information is updated, e.g., real-time updates, nightly updates, etc.</p>
9.	<p>If there is no online procedure provided to the school to monitor the loan process for a specific student, please describe the process(es) by which the school can obtain information to monitor a specific loan as it is being processed.</p>
10.	<p>Since UC students may be eligible for loan terms that are different than those of your standard loan products, how will a student who independently goes directly to your company or website know that he/she may be eligible for special terms?</p>

VENDOR RESPONSE FORM 2: APPLICATION & LOAN PROCESSING

Lender:

Targetted Discipline or Group:

APP & LOAN PROCESSING	
11. By what means will UC students, by Discipline or Group, obtain information about the special loan terms for which they may be eligible as a UC student? Will there be a special website for them to access? Please explain.	

VENDOR RESPONSE FORM 3: CUSTOMER SERVICE

Lender:

Targetted Discipline or Group:

CUSTOMER SERVICE	
1.	During what hours (Pacific Time) will the customer service representatives be available to UC staff?
2.	What types of issues, problems, questions, etc., will the customer service representative be able to address?
3.	Will UC staff be given a different toll-free telephone number to use than the one UC students are directed to call? (Yes or No)
4.	Describe how a UC staff person's call will be handled if the customer service representative is not available. For example, will the call be redirected to another customer service representative? Will the call go to that customer service representative's voice mail?

VENDOR RESPONSE FORM 3: CUSTOMER SERVICE

Lender:

Targetted Discipline or Group:

CUSTOMER SERVICE	
5.	If the UC staff person sends an email to the customer service representative, how soon upon receipt by the customer service representative will the campus staff person receive a) an acknowledgement of receipt of the email and b) receive a response?
6.	Describe how the quality, including accuracy of answers, is monitored among the call services staff who respond to calls from students.
7.	Describe how the call center's performance is monitored in terms of speed of answer, percentage of abandoned calls, etc.
8.	What are the call center's minimum acceptable performance standards for calls from both schools and students?

VENDOR RESPONSE FORM 3: CUSTOMER SERVICE

Lender:

Targetted Discipline or Group:

CUSTOMER SERVICE	
9.	Describe the services that will be offered to hearing impaired borrowers and how individuals will be made aware of those services.
10.	Describe any other special services that are offered to comply with the provisions of the American Disabilities Act.
11.	Does your company originate the loans or are the loans originated by a third-party servicer? If a third-party servicer, specify which one.
12.	Does your company service the loans in-house or are the loans serviced by a third party? If a third-party servicer is used, specify which one.

VENDOR RESPONSE FORM 4: DEBT COUNSELING

Lender:

Targetted Discipline or Group:

DEBT COUNSELING AND DEFAULT PREVENTION		
1.	Describe the entrance counseling services that will be provided to UC students who apply for a private loan from your company.	
2.	Describe the assistance that is expected, or requested, of the campuses/programs in support of your debt counseling efforts.	
4.	Describe the exit counseling services that will be provided to UC students who received a private loan from your company.	
5.	Describe the assistance that is expected, or requested, of the campuses/programs in support of your exit counseling efforts.	
6.	Describe the default prevention measures that your company routinely takes on its private loans.	

VENDOR RESPONSE FORM 4: DEBT COUNSELING

Lender:

Targetted Discipline or Group:

DEBT COUNSELING AND DEFAULT PREVENTION	
7. Describe the assistance or information that is expected, or requested, of the campuses/programs in support of your default prevention efforts.	

VENDOR RESPONSE FORM 5: DISBURSEMENT & RECONCILIATION

Lender:

Targetted Discipline or Group:

LOAN DISBURSEMENTS AND RECONCILIATION	
1.	For those campuses that currently receive loan disbursements via checks, describe what would be entailed for the campus to receive funds through electronic funds transfer.
2.	For loan amounts disbursed via checks, describe what the campus must do to report loan amount changes and what the required time lines are to effect the loan amount changes.
3.	For loan amounts disbursed to the campus via electronic funds transfer, describe what the campus must do to report loan amount changes and what the required time lines are to effect the loan amount changes.
4.	For loan amounts disbursed via checks, describe the campus responsibilities in terms of loan disbursement reconciliation.

VENDOR RESPONSE FORM 5: DISBURSEMENT & RECONCILIATION

Lender:

Targetted Discipline or Group:

LOAN DISBURSEMENTS AND RECONCILIATION	
5.	For loan amounts disbursed to the campus via electronic funds transfer, describe the campus responsibilities in terms of loan disbursement reconciliation.

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

NAME OF LOAN PROGRAM					
TARGETED DISCIPLINE OR GROUP					
BRIEF DESCRIPTION OF THE SPECIALTY LOAN					
BORROWER ELIGIBILITY CRITERIA					
LOAN TERMS					
1. Origination Fee Amount (specify fixed amount or percentage of what)					
2. Origination Fee Assessment (specify when the fee is assessed, e.g., at disbursement by term, at repayment after interest capitalization, at repayment before interest capitalization, etc.)					

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

	NAME OF LOAN PROGRAM					
3.	Guarantee Fee Amount (specify fixed amount or percentage of what)					
4.	Guarantee Fee Assessment (specify when the fee is assessed)					
5.	Other Loan Fee(s) (specify what the fee is for and the amount--identifying whether it is a fixed amount or percentage of what)					
6.	Other Loan Fee(s) Assessment (specify when each fee is assessed)					
7.	a. Enrolled & Grace Interest Rate Benchmark Calculation (e.g., 3-month LIBOR + 1.75)					
8.	b. In Repayment Interest Rate Benchmark Calculation (e.g., 3-month LIBOR + 2.25)					
9.	Variable or Fixed Interest Rate?					
10.	Length of Grace Period					

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

NAME OF LOAN PROGRAM					
11.	Frequency and Timing of Interest Capitalization, e.g., once at repayment, annually after each interim period, etc.				
12.	Maximum Repayment Term (not including periods while student is enrolled and during grace), e.g., 20 years				
13.	Describe any additional loan terms that affect borrower cost.				

ADDITIONAL LOAN TERMS					
1.	Specify provision(s) for "Interim Periods" (no repayments required) for other than periods of enrollment at UC and grace period, e.g., while enrolled at another school at least half time, while serving a medical internship, etc.				
2.	For each provision listed above, specify maximum length of "Interim Period" (no repayments required) and any other relevant restrictions.				

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

	NAME OF LOAN PROGRAM					
3.	Interim Periods & Repayment Term - Do interim periods extend the repayment term? (Yes or No)					
4.	Specify Provisions for Interest-Only Payments, e.g., while experiencing financial hardship					
5.	Length of Interest-Only Payments - specify maximum, aggregate length of time that interest-only payments can be made and any other relevant restrictions					
6.	Interest-Only Payments & Repayment Term - Do periods during which interest-only payments are being made extend the repayment term?					
7.	Are there any other repayment provisions available to assist borrowers who are experiencing temporary financial difficulty? If so, please describe what they are and the length of time they are available.					

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

NAME OF LOAN PROGRAM						
8.	Annual Loan Minimum					
9.	Annual Loan Maximum					
10.	Cumulative Loan Limit					
11.	Is there an interest rate cap? If so, what is it?					
12.	Is there an interest rate floor? If so, what is it?					
13.	Describe any additional loan terms not covered elsewhere on this form.					

BACK-END BENEFITS						
1.	Co-Maker Release Provision - specify if one is available and if so the terms					
2.	Percent of Co-Makers Who Qualify for the Release Provision - In the last 12-month period, how many and what percent of co-makers qualified for this provision?					

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

NAME OF LOAN PROGRAM					
3. Description of Other Back-End Benefits - Please describe any benefits that reduce the cost of the loan and for which the borrower is eligible to receive during or after the grace period.					
4. Back-End Benefit - Please describe the criteria that must be met in order to be receive the back-end benefit.					
5. If a certain number of on-time payments are required, does deferment or agreed-upon interest-only payments make the borrower ineligible to receive the back-end benefit?					
6. Describe any other factors that disqualify a borrower from receiving the back-end benefits.					
7. Percent of Borrowers Who Qualify for the Back-End Benefits - In the last 12-month period, how many and what percent of borrowers received the back-end benefit(s)?					

VENDOR RESPONSE FORM 6: SPECIALTY LOANS

Lender:

For a Bidder submitting a Quotation for Law, the Bidder must complete this form for a Bar Study Loan; for all other Disciplines/Groups, the completion of this Vendor Response Form is optional.

NAME OF LOAN PROGRAM					
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VENDOR RESPONSE FORM 7: TECHNICAL SUPPORT

Lender:

Targetted Discipline or Group:

TECHNICAL SUPPORT	
1.	Please list the standardized file exchange formats, e.g., Commonline 4 and Commonline 5, that are supported for your private loans.
2.	Please list the school based products, e.g., ELM, OpenNet, etc., that are supported for your private loans.
3.	Please list the Central Disbursement Agent(s) that can support your private loans.
4.	Please list the processes that are supported electronically, such as the application certification request, response files, change transaction files, etc., for your private loan products.
5.	Please list any other technical issues that should be considered to ensure a smooth interface between the campus and your system.

VENDOR RESPONSE FORM 8: OTHER COSTS & WORKLOAD ISSUES

Lender:

Targetted Discipline or Group:

OTHER COSTS & WORKLOAD ISSUES	
1.	Identify all the tasks and responsibilities the campus office will be expected to perform.
2.	Describe any additional costs or expenses, e.g., for software, the campus should anticipate incurring.