

BLUE AND GOLD OPPORTUNITY PLAN: IMPLEMENTING GUIDELINES

Communication about Blue and Gold Opportunity Plan

Campuses should provide a prominent link to the Blue and Gold Opportunity Plan on their websites. The information provided about the Blue and Gold should, at a minimum, cover what it is and how it works (e.g., it is a commitment about fee coverage, not a financial aid award), the eligibility criteria, and how to apply. The Blue and Gold section of the UCOP website (<http://www.universityofcalifornia.edu/blueandgold/>) provides a model.

Campus financial aid calculators should continue to focus on estimates of a student's actual grant eligibility. However, a reference and link to the Blue and Gold Opportunity Plan should be added to the comment section following the calculated estimates when the calculators are next updated.

Notification of Blue and Gold eligibility:

Campus financial aid awards should focus on a student's actual aid package, which in most cases will be unaffected by a student's Blue and Gold eligibility. However, campuses should notify Blue and Gold-eligible students on their financial aid offer letter that they provisionally qualify for the Blue and Gold Opportunity Plan with the understanding that Blue and Gold eligibility, like eligibility for all financial aid, is subject to verification.

Years of eligibility:

A student's years of eligibility at a particular UC campus is based on their academic status at time of entry to the campus.

<i>Academic status at entry</i>	<i>Terms of eligibility at the campus</i>
Freshman (with or without advanced standing)	12 quarters/8 semesters
Sophomore advanced standing	9 quarters/6 semesters
Junior advanced standing	6 quarters/4 semesters
Senior advanced standing	3 quarters/2 semesters

A term counts towards the student's years of eligibility if the student was enrolled at any time after the third week registration census.

The term counts whether or not the student meets the other eligibility requirements for the Blue and Gold.

If the student withdraws before the third week, the term does not count.

Part-time enrollment does not extend the number of eligible terms.

Enrollment in summer terms does not count towards years of eligibility.

Residency status:

A student must be a California resident in the term enrolled in order to be eligible for the Blue and Gold Opportunity Plan.

Application requirements:

A student must initiate the financial aid process by submitting a financial aid application (the FAFSA) by March 2 and complete the application process (e.g., provide additional documentation, corrections, etc.) by campus financial aid deadlines for file completion.

Cal Grant application:

Requirements about applying for a Cal Grant are the same as for UC grant eligibility. If the campus determines a student without a Cal Grant does not qualify for substitute UC grant because he or she did not meet campus requirements for applying for a Cal Grant (e.g., missed the March 2 FAFSA deadline), the student is also not eligible for the Blue and Gold.

Financial need requirement:

A student must have financial need according to the methodology the campus uses to establish eligibility for federal Title IV need-based programs, including any adjustments to Federal methodology that the campus makes under the professional judgment provision. Starting with the 2009-10 year, the fee/tuition component of students' Post-911 GI Bill benefits will be applied in determining Blue and Gold eligibility.

Income requirement:

A student must have family total income, as determined for federal need-based aid programs, below the cap for that year. For dependent students, parent income is used. For independent students, student income is used.

The income cap will be adjusted periodically. It is intended to equal or exceed the median income for a California household.

Enrollment term requirements:

A student must be enrolled in an academic year term to be eligible for the Blue and gold Opportunity Plan. The Blue and Gold does not extend to summer terms.

A student is eligible for the Blue and Gold Opportunity Plan while enrolled at another UC campus (e.g., the Intercampus Visitor Program). The campus responsible for the student's financial aid is also responsible for determining their Blue and Gold eligibility.

Basic financial aid eligibility requirements:

A student must meet a campus's other (non-financial) requirements for UC grant assistance to be eligible for the Blue and Gold Opportunity Plan. These requirements typically include: at least half-time enrollment, meeting campus satisfactory academic progress standards for financial aid purposes, not already holding a bachelor's degree, not in default on student loans or owing refunds.

A campus may not impose additional financial criteria beyond federal financial need and the income cap on Blue and Gold eligibility.

Corporate Student System reporting:

Campuses will add a new field to the Corporate Financial Aid file submitted to UCOP that indicates whether a student was or was not eligible for the Blue and Gold Opportunity Plan. An indication of Blue and Gold eligibility is required for all students with federal financial need.