

Cradle-to-Career Data Governing Board Staff Report

Date Report Issued: February 14, 2025
Attention: Members of Cradle-to-Career Data Governing Board
Subject: **P20W: SIB Data Partner and Points (Agenda Item 10)**
Staff Contact: Ryan Estrellado, Director of Data Programs

At this meeting, the Governing Board (Board) will have the opportunity to add a new data partner and associated new data points for the [P20W data set](#).

Requested Action:

Please review pages 29-31 of the [Governance Manual](#), which describes the process for formally adding data points to the list of P20W data points. (Per [Education Code section 10861\(m\)](#), the P20W data set is “the data set adopted by the governing board and requested from the data providers.”)

For this item, Staff recommends the Board to approve the following two motions.

- ❖ Motion 1: Move to approve the addition of ScholarShare Investment Board (SIB) as a data provider.
- ❖ Motion 2: Move to approve the request of data points from SIB on California Kids Investment and Development Savings (CalKIDS) to the [P20W data set](#), as presented.

Proposed Data Points:

Established in 2019 (launched in 2022) and administrated by the SIB, CalKIDS promotes access to higher education in California by offering *At-Birth funds* to newborns and *School-Age funds* to eligible low-income public school children. The proposed data points¹ are associated with the *School-Age funds* and include:

¹ The data points from SIB to be added to the Participation Agreement, including those for matching purposes, only include those data points collected directly by SIB.

- SIB-collected identifier for claimed accounts – for matching purpose²
- SIB-collected date of birth for claimed accounts - for matching purpose
- SIB-collected county for claimed accounts - for matching purpose
- Claimed the CalKIDS account
- Date claiming the CalKIDS account
- Initial seed deposit in the CalKIDS account
- Disbursed funds from the CalKIDS account
- Amount disbursed from the CalKIDS account
- Date making the disbursement from the CalKIDS account
- Institution receiving the disbursement from the CalKIDS account
- Amount in the CalKIDS account
- Linkage to ScholarShare 529 account
- Date making the ScholarShare 529 linkage

Context for the Proposed Data Points:

Adding SIB as a formal data partner and including CalKIDS data points in the [P20W data set](#) can close a gap in actionable information around 1) the utilization of the CalKIDS program, and 2) its impact on college access and affordability. The following are examples of questions that currently no other dataset can answer:

- Which California students have a CalKIDS account and what other resources do they receive?
- Are there any patterns of non-engagement for individuals who are slow to claim their accounts?
- Is there any correlation between claiming a CalKIDS account and a student's academic achievement in K-12 schools?
- Is there any correlation between the use of CalKIDS funds and college attendance?
- Is there any correlation between ScholarShare 529 account linkage and college persistence?

² The identifier is submitted to SIB at the time an individual claims a CalKIDS account. The identifier may be either the Statewide Student Identifier (SSID) or a SIB-created unique registration code.

Next Steps:

If approved, the Office will continue to work with SIB to develop the File Upload Specification and to prepare for the first batch of data import.

Context for the Related Resolution in Attachment A:

Because action taken at a Board meeting does not have a formal record until the minutes are adopted at the following meeting, in cases of changes to the P20W data set, the Office is providing a proposed resolution, which can immediately document the action taken by the Board. That resolution then provides the record of action taken for the Office to use to update documentation about the P20W data set or data transfers, without needing to wait for the adoption of the meeting minutes at the next quarterly meeting of the Board.

RESOLUTION NO. 25-01
APPROVAL OF THE SCHOLARSHARE INVESTMENT
BOARD AS A DATA PROVIDER, AND
THE INCLUSION OF SPECIFIED DATA TO THE P20W DATA SET
February 28, 2025

WHEREAS, the Office of Cradle-to-Career Data (C2C) is established pursuant to Education Code section 10862 to serve as a neutral administrative body of the California Cradle-to-Career Data System to establish and maintain a longitudinal data system that provides a source for actionable data and research on education, economic, and health outcomes for individuals, families, and communities, and provide for expanded access to tools and services that support the navigation of the education-to-employment pipeline, and under the direction of the Governing Board established pursuant to Education Code section 10864;

WHEREAS, C2C's authorizing statute establishes certain entities as data providers and Education Code section 10866(b)(4)(A) authorizes the Governing Board to add additional data providers;

WHEREAS, Education Code section 10861(l) provides for C2C to develop a participation agreement that establishes the framework for the use and exchange of data between partner entities, data providers, and C2C;

WHEREAS, Education Code section 10866(b)(4)(B) authorizes the Governing Board to request additional data points from data providers for addition to the P20W data set;

WHEREAS, the ScholarShare Investment Board (SIB), established pursuant to Education Code section 69981, oversees the state's 529 College Savings program;

WHEREAS, SIB was given the responsibility to administer the California Kids Investment and Development Program (CalKIDS), established pursuant to Education Code section 69996.1, and which establishes college savings accounts for all children who are California residents by a specified date and for children born in California after such date; and

WHEREAS, a media report in 2024 identified that many students and families were not aware of the accounts that were being held in their names and that the C2C Data System can match data from other data providers with SIB data to assist in identifying and notifying students and families of those accounts.

NOW, THEREFORE, BE IT RESOLVED by the Governing Board of the Cradle-to-Career Data System as follows:

1. The ScholarShare Investment Board is approved as a data provider to the P20W data set;
2. SIB shall be required to sign the Participation Agreement without re-execution by the Signatory Entities, pursuant to section 14.17 of the Participation Agreement, and any other required documents prior to exchanging data with C2C; and
3. The following data points are approved for addition to the P20W data set:
 - SIB-collected identifier for claimed accounts – for matching purpose
 - SIB-collected date of birth for claimed accounts – for matching purpose
 - SIB-collected county for claimed accounts – for matching purpose
 - Claimed the CalKIDS account
 - Date claiming the CalKIDS account
 - Initial seed deposit in the CalKIDS account
 - Disbursed funds from the CalKIDS account
 - Amount disbursed from the CalKIDS account
 - Date making the disbursement from the CalKIDS account
 - Institution receiving the disbursement from the CalKIDS account
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CERTIFICATE OF THE EXECUTIVE DIRECTOR
(Attesting to Action of the Authority)
Sacramento, California

I, Mary Ann Bates, Executive Director of the Cradle-to-Career Data System, hereby certify that the foregoing is a full, true, and correct copy of Resolution No. 25-01, APPROVAL OF THE SCHOLARSHARE INVESTMENT BOARD AS A DATA PROVIDER, AND THE INCLUSION OF SPECIFIED DATA TO THE P20W DATA SET, as adopted at a meeting of the Cradle-to-Career Data System held at 400 R Street, Sacramento, California 95811, on February 28, 2025, for which meeting all of the members of said Authority had due notice; and that at the meeting the staff recommendation was adopted by the following votes:

AYES:

NOES:

ABSTAINS:

ABSENT:

This resolution expires one year after the adoption date. Extensions must be approved by the Authority in a public meeting.

I further certify that the original minutes of said meeting and a copy of the original Resolution adopted at said meeting are on file in the Office of Cradle-to-Career Data; and that the Resolution has not been amended, modified, or rescinded in any manner since the date of its adoption, and the same is now in full force and effect.

IN WITNESS WHEREOF, I have executed this certificate.

By:

Mary Ann Bates, Executive Director

Date