

## MEMORANDUM

TO: Raymond Hall, Chair, Academic Senate

FROM: David Low, Chair, University Personnel Committee  
Maritere López, Chair, University Graduate Committee



DATE: October 24, 2023

RE: APM 311 – Policy on Teaching Associates

On 9/12/23, the University Graduate Committee (UGC) voted to forward a redlined revision of APM 311: Policy on Teaching Associates to the University Personnel Committee. On 9/21/23, the University Personnel Committee voted to take on and co-sign the UGC's work, and produced an updated redlined version of the policy.

The problematic issue, as initially identified by the UGC, was that APM 311 requires TA's seeking a tuition waiver to submit a FAFSA (see: 311.VI.7.a; 311.VI.3.c). This requirement means that non-resident and international students are automatically excluded from receiving tuition waivers. (While there are different waivers available to non-resident and international students, respectively, those are only a handful and not limited to TA's. Thus, only a very limited number of those waivers go to graduate students serving as Teaching Associates.)

The UGC determined that the FAFSA requirement was added to APM 311 in 2015 at the behest of the Personnel Committee. We do not know why the requirement was added, and internal records do not exist from that time. We combed through committee minutes from 2014-2015 and 2015-2016 but were unable to find out why the specific changes were made.

The Personnel Committee engaged in some fact-finding to ascertain whether the FAFSA requirement in APM 311 is required by state- or CSU-level policy. We consulted with Cheryl Chan, Director of the International Office, and Kelly Russell, Director of Financial Aid and Scholarships. In both cases we sought input about whether the FAFSA requirement could be lifted and what consequences doing so might have. We learned:

In reviewing the criteria for the waiver, it would appear the FAFSA requirement is included because that is how we determine if a student is eligible for the State University Grant. However, an international student or non-CA resident student cannot get the State University Grant. I don't know that I would take out the requirement for the FAFSA because of the State University Grant but maybe you add "if eligible to complete the FAFSA". I don't know that anything keeps you from removing it though.

Without a compelling reason to retain the FAFSA requirement in policy and a compelling reason not to (chiefly, equity), the Personnel Committee and UGC collectively make the following recommendations regarding amendments to APM 311:

1. Eliminate 311.VI.3.c – “complete a FAFSA by the published priority deadline, and”
2. Change 311.VI.3.d – “~~be ineligible for~~ **not have received** a State University Grant (SUG) **in the academic year of appointment.**”
3. Eliminate 311.VII.a – “To receive a TA (TA) tuition waiver, students must file a FAFSA each year by the published priority deadline.”
4. Change 311.VII.b – “Students who enroll in 6 units (equivalent to 4 weighted graduate-level units) or less ~~will~~**may** receive funding based on half-time enrollment and those who enroll in more than 6 units ~~will~~**may** receive support based on full-time enrollment.
5. Remove hyperlink in the References section
6. Change gendered pronouns to gender-neutral pronouns throughout the policy.

Enclosed are new tracked changes to APM 311 for the Executive Committee and full Senate review.

Respectfully submitted,

D. Low and M. López

CC: Xuanning Fu, Provost  
Jim Schmidtke, Interim Associate Vice President for Faculty Affairs  
Cheryl Chan, Director of the International Office  
Kelly Russell, Director of Financial Aid and Scholarships