I. Purpose

This section outlines the policy and procedures for establishment and review of Course Materials and Services Fees (CMSF) for students to participate in the instructional activities of a course.

II. Policy

A. The University may establish and set fee levels for CMSFs as defined in DA 2559 and the Guidelines for Implementing Course Materials and Services Fees.

B. Fee limits

1. Undergraduate and graduate courses
   a. The fee may not exceed $65.00 for courses with a maximum actual cost of $160 per student, and may not exceed $80.00 for courses with an actual cost of $161 or more per student.
   b. The fee may not exceed the actual cost per student of the materials provided for the course.

2. Professional school programs
   The fee may encompass a variety of courses from a prescribed course of study and may not exceed the actual cost per student of the materials provided.

C. Criteria for including personnel costs

If any portion of an employee’s salary and benefits are to be included in the CMSF, the staff member must have a technical role and perform enhanced, highly specialized, technical duties related to the services provided to the course.

1. A staff member whose salary and benefits are included in a CMSF must not be appointed in a clerical, analyst, student advisor, or a non-technical managerial classification.

2. Salaries, wages, and employee benefits of ladder rank faculty, lecturers, graduate teaching assistants, and staff providing general instructional support must not be included in a CMSF.

3. The duties of a staff member are predicated upon the course being offered. If the course under review is not offered, the staff member would not be performing the duties.

4. No more than 33.3% of a staff member’s annual salary and benefits during the academic quarter (or 50% during the academic semester) may be charged to one course’s CMSF. Exceptions will be considered by the CMSF committee through the normal fee submission process.
D. Departments may exempt students from the fee at their discretion for reasons including extenuating circumstances or financial hardship. The departmental request for course material fee waiver can be found at http://budget.ucdavis.edu/resources/forms/course-materials-fee.html.

E. Revenues are retained by the department or professional school in a designated account and are applied only to the cost of the materials associated with the approved course or set of courses.
   1. Departments must accurately document the cost of supplies, consumables, and other fee components associated with each course or set of courses for which a fee is assessed.
   2. Revenue from the fee must be accounted for separately and will be reported annually as part of the budget review process.
   3. Central campus administrative units (e.g., Office of the University Registrar, Accounting and Financial Services, Budget and Institutional Analysis) may incur programming and processing costs related to the fees, which may be included as part of the unit's annual budget review.
   4. If the fiscal close account balance exceeds 50 percent of the expenditure for the last year the course was offered, the department must submit a request to lower the fee.
   5. Departments may group similar undergraduate courses together to charge the same fee for each course only with the explicit approval of the CMSF Committee and if the department can prove grouping the courses together will provide cost savings.
   6. Course textbooks are not included in the CMSF.

F. Departments are responsible for providing to the students enrolled in a course charging a CMSF information relevant to the CMSF by the first day of instruction.
   1. Departments must make a list of all materials and services charged to the course materials and services fee available to the students enrolled in a course, either through the course syllabus or on a website. The list of materials and services may group materials by category, such as chemicals, and must specify the cost charged to the CMSF for staff compensation, if any.
   2. The course syllabus must list the person who will receive student concerns regarding items charged to the CMSF.

III. Course Materials and Services Fees Committee

A. Members of the CMSF Committee are appointed by the Chancellor, with advice from appropriate constituencies, for a two-year term.

B. The committee must be composed of the following:
   1. Two members of the Service Activities Advisory Group (Recharge Group).
   2. Two undergraduate students and one professional student from a school with a CMSF.
   3. One member of the Academic Senate Undergraduate Council.
   4. One faculty member from a college responsible for undergraduate education and one faculty member of a professional school with a CMSF.
   5. One dean of a college responsible for undergraduate education or one dean of a professional school with a CMSF. The dean may designate an associate dean as a representative.
   6. One assistant dean for administration of a college or division responsible for undergraduate education and one assistant dean of a professional school with a CMSF.
7. The Director--Financial Aid.

C. The CMSF Committee is responsible for the following:

1. Reviewing proposals for new or revised CMSFs, assuring that fees are reasonable and necessary, seeking consultation with students, faculty and others as necessary, and assuring that proposals comply with University policy and guidelines.

2. Making recommendations to the Chancellor on CMSF proposals.

3. Reviewing requests for renewal of existing fees every three years.

4. Annually recommend to the Chancellor whether the course fee limit should be changed to reflect inflation or other factors.

IV. Procedures

A. Review and approval of fee proposals

1. The department chair or program director prepares and submits a proposal to the dean of the college/school. Proposals must contain supporting materials that include a cost analysis, a comparison of income and expenses, historical data that documents the need and basis for the fee, the prior year fiscal close balance for the fee account, and account number if the proposal is for a fee renewal or increase.

2. The dean consults with the college/school executive committee regarding the appropriateness of the proposed fee and compliance with University policies and guidelines before submitting to the CMSF Committee.

3. The committee reviews the proposal, consults as necessary, and sends their recommendation to the Chancellor.

4. The Chancellor reviews the proposal and either approves or disapproves the fee, providing reasons for any disapproval.

5. The committee notifies the department chair or program director and the dean of approval or disapproval of the fee.

6. If approved, the committee chair notifies the University Registrar and Student Accounting.

7. The University Registrar notifies students of approved fees through the quarterly class schedules and the General Catalog.

8. Fees are approved for a three-year period and will be discontinued unless the department requests renewal of the fee.

B. Assessment and refund of fees

1. Fees are assessed to those students enrolled in the applicable course or set of courses by the Office of the University Registrar.

2. Students who drop or withdraw from a course after the drop deadline will not receive a refund of the fee.

3. The dean must notify the University Registrar before the first day of instruction to request that the fee not be charged to an entire course section.

V. Further Information

A. Budget and Institutional Analysis Course Materials and Services Fee [website](#)
B. Office of the University Registrar, Schedule of Classes and Class Search Tool.

VI. References and Related Policies

Office of the President:

A. Delegation of Authority to Set Miscellaneous Student Fees and Deposits, Course Materials and Services Fees, Service Charges, and Summer Session and University Extension Fees (DA 2559).

B. Guidelines for Implementing Course Materials and Services Fees.

C. Universitywide Student Refund Policy.