August 10, 2012

DEANS AND DEPARTMENT CHAIRS

SUBJECT: Course Materials and Services Fees - Proposals for Fees Effective In Fall 2013

Dear Colleagues:

This letter serves as the call for new Course Materials and Services Fees (CMSF) proposals, revisions, or renewals of an existing fee. New fees are approved for a three-year period, after which a renewal request is required to prevent the fee from expiring. Any proposed changes within the three-year approval period must be submitted to the Course Materials and Services Fees committee as a revised fee during the appropriate review cycle. New and revised fees may be implemented only in fall quarters.

Course Materials and Services Fees Policy

The Course Materials Fee policy, Policy and Procedure Manual 330-86, was revised in August 2012 to incorporate changes recommended by the CMSF committee during spring 2012. The revised policy can be found at http://manuals.ucdavis.edu/PPM/330/330-86.pdf.

In order to fully understand the revised policy requirements, I encourage you to review the policy in its entirety.

Procedures for New, Renewal or Revised Course Materials and Services Fees

In an effort to have course materials fees approved in time to be published in the Class Schedule & Registration Guide and the Course Catalog for fall 2013, the review process will begin in November 2012. Colleges/divisions should submit proposals, addressed to Principal Budget Analyst Seija Virtanen (svirtanen@ucdavis.edu) in Budget and Institutional Analysis (BIA), no later than Wednesday, October 31, 2012, for review for fall 2013 implementation.

Submission Process. The department chair signs the CMSF proposal that is then routed to their respective dean’s office (please consult with your college/division dean’s office about their particular internal review process which includes executive committee consultation). The college/division dean then submits a letter, addressed to Principal Budget Analyst Virtanen that provides: 1) a list of the course materials fees proposed, and 2) concurrence by the college/division Academic Senate Executive Committee.

The department's written proposal should be prepared based on the information provided, using the Course Materials and Services Fees Proposal form. The form is an Excel worksheet that includes formulas for ease of data entry. A copy of this CMSF call letter, the Course Materials and Services Fees Proposal form, the CMSF policy and a list of current approved fees, are all available on BIA's web site at http://budget.ucdavis.edu/forms/course-materials-fee.
Please also note that if a fee is scheduled to expire in June 2013, departments need to submit the fee for renewal or revision for it to continue.

Renewal of CMSF. CMSF are approved for a three year period and will expire unless the department requests a renewal. A "renewal" is a request to continue a fee, without making a change to the fee amount. To renew a fee that does not generate a deficit or a surplus in excess of 8% of the original budget, the department need only complete section "I - Course Materials & Services Fee Proposal" and section "IV. Course Materials and Services Fees - Renewal Certificate". If the fee generates a deficit or surplus in excess of 8% of the original budget, departments should also complete section "II. Course Materials and Services Fees - New & Revised Data," and an explanation should be included in the dean's letter.

New or Revised CMSF. For new CMSF, the department prepares the Course Materials and Services Fees Proposal form, Sections I-III, for review by the college/division dean and executive committee regarding appropriateness of proposed fee and compliance with UC and campus policy. For revised CMSF, the department prepares a Course Materials and Services Fees Proposal form, Sections I-III, which includes available historical data (in Section II) and its impact on the requested fee revision. For both new and revised CMSF, the Department Chair and Dean must sign Section IV of the Course Materials and Services Fee Proposal form.

Again, please consult with your college/division dean's office for information about their internal review process.

Review, Notification, and Accounting Process. The CMSF Committee will review the submittal, make a recommendation to the Chancellor and notify the department of the fee approval or denial. If a fee renewal is approved, no further action needs to be taken by the department.

The CMSF Committee will notify the department chair of the Chancellor's decision. If approved, BIA will notify the Office of the University Registrar (OUR) of the new fee so that it can be published in the quarterly class schedules and an annotation made in the Banner database.

The department should establish an account for receipt of fee income and will monitor expenses and income as they are incurred. Revenue from each course materials fee must be accounted for separately and may not be commingled with State General Funds. Departments must accurately document the costs associated with the course materials; departments needing assistance determining the easiest way to track course level income and expenses should contact Student Accounting at 752-3646.

Departments must include a notice of the fee in the course syllabus, and must provide an explanation of the materials paid for with the CMSF either in the syllabus or on the course website. On the first day of class, the department should inform students about the fee and describe the waiver option. Students who cannot pay the fee will be responsible for seeking a waiver from the department and providing the required documentation before the 20th day of instruction. Departments will be responsible for designating a representative to approve waiver requests and providing Student Accounting with a list of students in each section who are exempt from the fee. This list should be provided by the 30th day of instruction.
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Departments who deny a fee waiver request should refer the student to the Financial Aid Office for review of their financing options. Student Accounting will bill students for the course materials fee and credit those who are exempt from the fee. Student Accounting will also deposit the income into the account established by the department.

If you have any questions about the forms or the process, please contact Principal Budget Analyst Virtanen at 752-7628. Please feel free to call me at 752-0274 if you have any questions about the committee review.

Sincerely,

[Signature]

Ian Blake, Assistant Dean
Division of Humanities, Arts and Cultural Studies
Chair, Course Materials and Services Fees Committee 2012-13

cc: Assistant Deans
    University Registrar Lopez
    Principal Analyst Virtanen
    Interim Director of Student Accounting Acevedo