

2015-16 Course Materials and Services Fee (CMSF) Committee (For 2016-17 CMSF fees, effective Fall 2016)

GENERAL INFORMATION

Chancellors may approve a Course Materials and Services Fee (CMSF) for students to participate in the instructional activities of a course. Course materials and services are defined as materials, supplies, tools, or equipment which are consumed, retained or used by the student or other materials or services necessary to provide a special supplemental educational experience of direct benefits to the students. UC Davis has a CMSF policy (<http://manuals.ucdavis.edu/PPM/330/330-86.pdf>) which:

- *Establishes a CMSF Committee* - The committee to reviews and consider changes to CMSF fees, ensures that campus and UCOP policies are followed, and makes recommendations to the Chancellor.
- *Specifies appropriate constituencies for committee membership* – The membership is representative of broad campus interests that shall be composed of two faculty members, one Academic Senate Undergraduate Council, two undergraduate/ one graduate (from a professional school with a CMSF) students, two staff from Rate Group Committee, a dean, two assistant deans, and the director of Financial Aid Office.
- *Establishes fee Limits* - Fees may not exceed \$65 for courses with the maximum actual cost of materials is less than \$160 per student and may not exceed \$80 for courses with an actual cost of materials exceeds \$160 or more per student. The UC system does not place the dollar limits on CMS fees. The current levels were established by UCD.
- *Specifies that fees for professional school programs* 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.
- *Allows for Fee Waivers* - Departments may exempt students from the fee at their discretion for reasons including extenuating circumstances or financial hardship.
- *Establishes a Process for Fee Accountability* - Revenues are retained by the department or professional school in a designated account and are applied onto to the materials associated with the approved course or set of courses.
- *Allows for Policy Changes* - The committee may also review or propose changes to the campus policy on CMSF.

OUTCOME FOR 2016-17 CMSF – EFFECTIVE FALL 2016

There is an annual process for reviewing and approving CMSF at UC Davis. For 2016-17 CMSF fees, effective Fall 2016, the call for proposals was sent to colleges/schools (departments) on August 17, 2015. Proposals were submitted to Budget and Institutional Analysis (BIA) in Fall 2015. The recommendations were sent to Chancellor after the Committee's review process was complete.

The Committee evaluated 78 proposals for new and revised fees for conformance to policy and received 42 proposals for fees to be renewed at their current rate. There were 32 discontinued fees. The approved 2016-17 CMSF list, effective Fall 2017 is available at: <http://budget.ucdavis.edu/studentfees/cmsf/index.html>

The Committee held five meetings and had a quorum of members at each meeting. Member participation was active, from our staff, faculty and student members during the review and voting process. The committee roster is provided on page 3 of this report.

Renewed CMSF. A renewal is a continuation of a previously approved fee, with no changes to the fee amount. If a fee was scheduled to expire in June 2016, departments submitted a renewal proposal for the fee to continue.

New or revised CMSF. Proposals forms for new or revised fees were submitted by the departments and were reviewed by the college/division dean and Executive Committee for review of appropriateness and compliance with UC and campus policy before presenting to CMSF Committee. CMSF Committee reviewed and evaluated all expenses, historical financial data, as well as projected costs and revenues to determine if the proposed CMSF expenses/amounts were appropriate and within guidelines of CMSF policy. Analyses were done to ensure that actual costs align with revenue generated for each CMSF proposal.

Summary of outcome for 2016-17 CMSF:

3 New (all at \$65 cap)

12 Revised – Increase

21 Revised – Decrease

42 Renewals at same rate (certificate for fees to be renewed, required every 3 years)

32 Discontinued

- Unless otherwise noted, fees were approved for a three-year period and will be discontinued unless the department requests renewal of the fee.
- The CMS fees for 2016-17 were approved by the Chancellor Katehi on April 13, 2015.
- The department/colleges, University Registrar and Student Accounting were notified.
- The University Registrar notified students of approved fees through the quarterly class schedules posted in course catalog.

OTHER ITEMS

In addition to the recommendations of the 2016-17 CMSF fees, the Committee submitted a recommendation to amend the current CMSF policy to include better guidance on allowable staff costs.

Last year, there were numerous proposals were submitted that added new staff-related costs to be recovered by the fee. Current UC policy guidelines state that staff costs are not allowable except where: “staff are assisting in providing enhanced, highly specialized instruction.” The CMSF Committee thus disallowed costs of staff providing logistical support, regardless of its specialized nature. Traditionally, most of the costs recovered through CMSFs were for materials used in courses. In recent years, however, staff-related costs have increasingly been included in a significant number of CMSF proposals. In response, the CMSF Committee has reviewed UC and campus policies regarding staff costs and had several discussions on the application of these policies to various proposals.

Therefore, for this year’s process, the Committee instituted a one-year moratorium on the adoption of new staff costs in CMSF proposals for academic year 2016-17. Staff costs that have been previously approved in CMSFs were permitted to continue during this time. The moratorium allowed the CMSF Committee sufficient time to clarify and communicate policy in this area for the future years.

The Course Materials Fee policy, Policy and Procedure Manual 330-86, is currently undergoing revision to incorporate changes made at the campus level. The draft campus policy, available in the track changes format so that the edits are easily identifiable and a link to the systemwide policy and guidelines can be found at <http://budget.ucdavis.edu/resources/forms/coursematerials-fee.html>. The draft policy developed by the committee this past year will be used as interim guidelines for 2016-17 year’s proposal review process.

During next year’s review process, the committee will continue to 1) give careful consideration to the complex issues raised by the inclusion of staff costs in CMSFs, 2) thoroughly evaluate the proposals, and 3) make recommendations consistent with the appropriate policies and principles.

COURSE MATERIALS AND SERVICES FEES COMMITTEE 2015-16 MEMBERSHIP

- Steven Roth - Assistant Dean, Division of Social Sciences (Co-Chair)
- Mary McNally - Exec Assistant Dean, School of Veterinary Medicine (Co-Chair)
- Helene Dillard - Dean, College of Agricultural and Environmental Sciences
- Delmar Larsen – Professor, Department of Chemistry
- Munashe Chigerwe - Professor, School of Veterinary Medicine
- Bill Jackson - Budget/Fiscal Officer, MPS
- Sonja Colbert - Executive Director/COO, Chancellor & Provost Office
- Deborah Agee - Director, Financial Aid Office
- Anna H. Lam - Undergraduate Student (Sociology, Psychology)
- Jing Mai - Undergraduate Student (Neurobiology, Physiology and Behavior)
- Cody Patrick Blumenshine - Professional Student with a CMSF (Veterinary Medicine)

Budget and Institutional Analysis – CMSF Committee Staff Representative

- Teresa Strausser, Budget Analyst