



# UC San Diego

## Policy & Procedure Manual

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### INSTRUCTION, PROCEDURES RELATED TO

#### Section: 120-9

Effective: 01/01/1999

Supersedes: Not Applicable

Review Date: TBD

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Issuing Office: [Chancellor's Office](#)

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### COURSE MATERIALS FEES

#### I. REFERENCES AND RELATED POLICIES

##### A. Office of the President – Coordination & Review

[DA 2559](#) Revised 2/2/12  
End Revision

#### II. BACKGROUND

In May 1996, the Office of the President (OP) revised the Delegation of Authority for control over Miscellaneous Student Fees, Service Charges, and Deposits. Each Chancellor was delegated the authority to establish Course Materials Fees (CMF) to recover the costs of materials to be consumed, retained or used by the students, the special costs associated with use of University-owned tools, musical instruments, or other equipment, or the cost of other materials or services necessary to provide a special supplemental educational experience of direct benefit to the student.

#### III. POLICY

A. Course materials 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 benefit to the student. Science laboratories and art studios are examples of courses in which students are required to purchase consumable supplies. Health sciences courses are examples of courses in which students are required to purchase tools and instruments. Film production or music performance courses are examples of courses in which students may be required to rent, for exclusive or extensive access to, University-owned equipment or instruments. Anthropology courses offering special field trip opportunities to students are examples of course providing a special supplemental educational experience for which a fee may be charged.

1. "Materials and Supplies" may include, but are not limited to, such items as chemicals, solutions, gloves, filters, biological specimens, artists' media, glassware, photographic chemicals and other one-time use items. These also may include the reproduction costs for supplemental materials such as laboratory manuals and noncommercial computer software and costs associated with providing live models for art classes. All costs related to photocopies such as papers, toners, maintenance, other than for laboratory manuals, shall be subject to inquiry on a case-by-case basis.
2. "Tools and Equipment" includes scientific or medical tools, musical instruments, video and audio equipment, and other equipment related to enrollment in a course, so long as the student is given ownership (if purchased) or extensive use (if rented) of the tools or equipment and, where feasible, has the option of

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securing equivalent tools or equipment elsewhere. These may include the costs associated with the use of University-owned tools and equipment for out-of-class learning activities or extracurricular use, or the purchase of computer software if the student retains ownership of the software.

3. “Materials and services for special supplemental educational experiences” are materials and services that offer students a special educational opportunity, such as travel costs for archeological digs, or the cost for film rentals.

**B.** Course Materials Fees (CMF) may not be charged to cover any costs relating to the provision of facilities or services required for the general operation of the institution. The following may not be included in course materials fees, but does not represent an exclusive listing:

1. salaries, wages and employee benefits of support personnel
2. allowances for maintenance, depreciation and replacement of instructional equipment located and utilized in classrooms and labs primarily during scheduled periods of instructions
3. reproduction of copyrighted materials for course readers or audio or video collections
4. course syllabi

**C.** Course Material Fees Committee (CMFC)

A Course Material Fees Committee was formed in response to the Office of the President’s May 13, 1996 delegation of authority to the campus.

The committee is composed of representatives from Academic Affairs, Associated Students (President, Vice President, or Commissioner), Resource Management and Planning, Business and Financial Services, Graduate Student Association, Student Affairs, and the Academic Senate.

The charge of the committee is as follows:

- Review the Course Materials Fee recommendations as developed by the Miscellaneous Student Fee Work Group and establish campus procedures for the submittal of Course Materials Fee Proposals to initiate new fees and adjustments to existing fees.
- Review new fee proposals, including proposals to adjust existing fees, and develop recommendations to the Chancellor by the timeline established in the campus procedures.
- Develop a reliable procedure for the periodic review and re-establishment of fee limits keeping in mind that recommendations regarding future fee limits shall be made with consideration given first and foremost to the students.
- Develop a process to periodically review and reassess the validity of existing Course Materials Fees.
- Establish campus procedures in accordance with OP's policies for the handling of fee revenues, billing, refunds and annual reporting requirements.

**IV. PROCEDURE**

**A. Fee Establishment Approval Process**

Departments may only assess and collect mandatory course-related fees that have been specifically approved by the Chancellor. The campus Course Materials Fees Committee (CMFC) is responsible for the review of new fee proposals, including proposals to adjust existing fees, and providing recommendations to the Chancellor. The CMFC encourages departments to plan the submission of Course Material Fee proposals for fall quarter implementation. The following is a required five-step review process:

**Step 1:** The chair of an academic department or the director of an academic program submits a course materials fee proposal to their respective academic deans. The proposal shall contain appropriate supporting materials, as described below in the “Proposal Format” section.

**Step 2:** If the academic dean concurs with the chair’s proposal, he or she forwards the proposal package to the Chair of Course Material Fees Committee through the Office of Resource Management, mail code 0936, by the end of November.

**Step 3:** The Chair of CMFC distributes the proposal to all CMFC members for review and discussion. Final committee recommendations to the Chancellor shall be made by January 15.

**Step 4:** The Chancellor determines whether to authorize the fee in accordance with the May 13, 1996 delegation of authority letter by the end of January.

**Step 5:** Upon receiving approval from the Chancellor, the CMFC will inform the department to notify the Registrar’s Office of approved changes to be incorporated in the quarterly student Schedule of Classes and Account Receivable System. The department is also responsible for updating the campus General Catalog via UCSD Publications by the established deadlines.

**B. Fee Communication**

Approved course materials fees must be communicated to all affected constituencies. Fees may not be charged without prior notification via the student Schedule of Classes. In addition, the campus General Catalog must be revised at the earliest possible opportunity to include a statement indicating that a Course Material Fees is required. It is the department’s responsibility to ensure that a statement regarding the required fee appears within the individual course listing.

**C. Late Proposals**

Proposals that are received by the Course Material Fees Committee after the November 30 due date will be reviewed for implementation for Winter or Spring quarter of the next school year. The fee review process spans approximately three months to allow adequate consultation time for students, staff, faculty, etc. It is important to note that fee proposals are not reviewed during the summer. Again, fees must be published in the Schedule of Classes and campus General Catalog as outlined in B. Fee Communication above.

**D. Proposal Format**

A completed [Course Materials Fee Request Form, Exhibit A](#), must accompany the proposal to establish a new Course Material Fees or adjust an existing Course Material Fee.

**E. Fee Limits**

The following elements shall be considered when determining what constitutes a reasonable fee:

- existing course material fees
- cost per student
- relationship between the fee and its purpose.

**F. Fee Revenues**

Fee revenues shall be retained by the department in a designated account to be applied only to the cost of materials associated with the approved course fees. Revenues collected for a specific course cannot be transferred to cover the costs of other courses.

**G. Year-End Surplus/Deficit Balances**

Surplus balances must be retained in a departmental account to be used in the subsequent year towards the same courses. The departments must absorb any deficit balances. An adjustment of the fee level is required to help reduce the amount of any future surpluses or deficits.

**H. Billing and Refunds**

Each Course Materials Fee must be included in the Student's Account Receivable System. If a student drops a course by the end of the second week of instruction, the student will receive a full refund. Course material fees will not be refunded to students who drop after the end of the second week of classes.

**I. Student Aid**

The cost of Course Material Fees shall be included in the student financial aid budget for determination of students' financial aid awards. Course Material Fees costs are covered under the "books and supplies" category in the student aid budgets.

**J. Annual Review and Reporting**

By September 1st of each year, a courtesy notice will be sent to each of the academic departments, who have an existing course materials fee(s), to provide the campus Budget Operations, Planning and Analysis Office with an annual year-end report of the prior year's course materials fee income and expenditures. This report must be submitted through the Dean's Office of the respective academic department, by

September 30<sup>th</sup> of each year, *Exhibit B*. After the campus Budget Operations, Planning and Analysis Office has reviewed and analyzed data provided in the reports, they will be forwarded to the Chair of Course Materials Fee Committee. The reports will be used to ensure justification for continuance of the fee and campus compliance with systemwide policies, and for reporting to the Office of the President as required.



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## INSTRUCTION, PROCEDURES RELATED TO

**Section: 120-9 EXHIBIT A**

Effective: 01/01/1999

Supersedes: Not Applicable

Review Date: TBD

Issuance Date: 01/01/1999

Issuing Office: [Chancellor's Office](#)

### Exhibit A

#### UNIVERSITY OF CALIFORNIA, SAN DIEGO

#### PROPOSAL TO ESTABLISH COURSE MATERIALS AND SERVICES FEE

Academic Division: \_\_\_\_\_

Department: \_\_\_\_\_

Course Number and Name: \_\_\_\_\_ Academic Units: \_\_\_\_\_  
*(Please provide a copy of Course Description and Course Approval from the CEP Subcommittee or Graduate Council)*

Contact: Name: \_\_\_\_\_

Phone: \_\_\_\_\_

Mail Code: \_\_\_\_\_

E-mail: \_\_\_\_\_

The proposed fee is for: (please check  all that applies)

- |   |  |
|---|--|
| <input type="checkbox"/> a new course materials fee | <input type="checkbox"/> a proposed adjustment to an existing fee (current fee: _____) |
| <input type="checkbox"/> an undergraduate course    | <input type="checkbox"/> a graduate/professional course                                |
| <input type="checkbox"/> a major requirement course | <input type="checkbox"/> an elective course  |

1. What is the amount of the proposed fee? \$ \_\_\_\_\_

Proposed effective quarter: (Fall/Winter/Spring) \_\_\_\_\_ Quarter  
Summer Session \_\_\_\_\_ (I, II or Special)

2. Describe the activities that will be funded with the proposed fee.

\_\_\_\_\_  
\_\_\_\_\_

3. What is the **supplemental academic benefit** to the students paying the fees?

\_\_\_\_\_  
\_\_\_\_\_

4. Explain how these expenses have been paid in past years and why funding source can no longer cover it.

\_\_\_\_\_  
\_\_\_\_\_

5. What are the consequences if the proposed fee is denied, or if it is approved but only for a partial amount?

\_\_\_\_\_  
\_\_\_\_\_

6. What is the total cost impact related to materials and services that students enrolling in this course must pay?  
*(Examples: required text books, lab manuals, cost to attend special educational event, other materials and services)*

\_\_\_\_\_  
\_\_\_\_\_

**University of California, San Diego Policy – PPM 120 – 9 Exhibit A  
PPM 120 – 9 Course Materials Fees**

**EXHIBIT A: PROPOSAL TO ESTABLISH COURSE MATERIALS AND SERVICES FEE**

7. Can the students reasonably secure these materials elsewhere? Why or Why not?

\_\_\_\_\_

\_\_\_\_\_

8. Estimated enrollment per course: \_\_\_\_\_

<b>Itemize Materials/Supplies/Services</b>	<b>Quantity</b>	<b>Per-unit Cost</b>	<b>Estimated Cost</b>
I. _____	_____	_____	_____
II. _____	_____	_____	_____
III. _____	_____	_____	_____
IV. _____	_____	_____	_____
V. _____	_____	_____	_____
VI. _____	_____	_____	_____
VII. _____	_____	_____	_____
		Est. Total Cost	_____
		Est. Cost Per Student	_____
		<b>Proposed Per Student Charge</b>	_____

9. Required Signatures:

**Department Chair's Approval**

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Dean of Academic Division's Endorsement**

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Vice Chancellor Office's Endorsement**

Name: \_\_\_\_\_ Signature: \_\_\_\_\_ Date: \_\_\_\_\_

ACADEMIC AFFAIRS       HEALTH SCIENCES       MARINE SCIENCES

Submit to:  
**Kim Chi Le, CMSFC Chair**  
**Campus Budget Office**  
**Mail Code: 0936**

*Revised: October 2011  
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