FEE MODEL THREE YEAR TRANSITION GUIDELINES AND IMPLEMENTATION TIMELINE FOR MU EXTENSION

The “Guidelines for Generation and Use of Fees for MU Extension” document provides guidelines for establishing fees for MU Extension programs and services. It is understood that current practices regarding fees vary widely from program to program, county to county, and faculty member to faculty member.

In the interest of moving deliberately and effectively toward the described end goals, the following **three-year transition guidance and implementation timeline has been established**. It is acknowledged that some units (particularly in continuing education) already effectively use fees and require no transition to a new process. Further it is expected that some units of the organization are positioned to make the described transition more quickly than the timeframe described. Finally, it is recognized that some units will require diligent work to complete the transition within the timeframe.

KEY IMPLEMENTATION OBJECTIVES TO BE COMPLETED BY THE END OF YEAR THREE:

By **June 30, 2012,** it is expected that:

- All programs will be reviewed routinely for cost and a fee charged as appropriate for the program and the audience.
- A “Fee Generation Worksheet” will be completed for all programs at the state and/or local level as applicable.
- Base fees for programs where a committee has deemed appropriate have been set.
- All faculty and staff who deliver designated statewide programs will be required to collect at least the base fee, with flexibility at the local level to add additional amounts to the required fee to cover local costs. The base fee may be paid from alternative funding sources as noted in the “Guidelines for Generation and Use of Fees for MU Extension.” There also may be a maximum fee established if it is deemed appropriate to do so.
- The distribution of revenues collected among program partners will be fully implemented.
- A plan to guide the provision/use of financial incentives as part of the MU Extension revenue generation environment will be fully developed and implemented.

ANNUAL IMPLEMENTATION OBJECTIVES:

PRE-LAUNCH

May 2009 — The Fee Committee reaches consensus on the "Guidelines for Generation and Use of Fees in MU Extension," "Fee Generation Worksheet" and plans for implementation and communication. Fee Committee present plans to Regional Directors, Program Directors and Extension Administration, who represent the Tiger Leadership Roundtable (TLR).

June 2009 — Dr. Ouart approves proposed fee plans.

June 2009 — Fee Committee, in conjunction with MU Extension Media Group, develops a complete communications plan to share fee generation information and vision with MU Extension faculty and staff, extension councils, and other program stakeholders as applicable.

June , 2009 — Communication process begins with Regional Directors, Program Directors, and others.

YEAR 1 - July 1, 2009–June 30, 2010:

July 2009 — An online "Fee Generation Worksheet" is completed and posted to the Web for access by faculty and staff.

Early August 2009 — The communication process throughout the organization is launched with a Video Clip.

August – December 2009 Training is conducted for use of the Fee Generation Worksheet.

August - September 2009

The broad vision of the "Guidelines for Generation and Use of Fees for MU Extension," "Fee Model Transition Guidelines" and "Three-Year Implementation Timeline" is communicated by RDs and PDs to regional and state faculty and staff.

RDs share with CPDs an MU Extension Fee Generation PowerPoint and FAQ document that is to be shared with Extension Councils.

August 09 - June 2010

Program Directors lead the process to determine cost analysis and fee establishment where appropriate for 20 percent of their programs by June 30, 2010. Extension Administration provides support for this process. Program Directors communicate with regional and state faculty and staff and stakeholders the fee structure for programs as they are established.

December 2009	RDs, CPDs and others have shared with Extension Councils the broad vision of the plan and implementation guidelines for fee generation by MU Extension. Supervisors and Human Resources incorporate fee generation concepts and methods into orientation training for new employees.
January 1, 2010	As appropriate, individual faculty and staff members are required to complete a "Fee Generation Worksheet" for every program where a fee is charged. "Fee Generation Worksheet" data are collected by MU Extension for review and analysis and used as a basis to inform future general revenue allocation.
March 2010	MU Extension Administration has developed and implemented the appropriate accounting processes for credit card payment of fees for MU Extension programs at state and county levels.
March 2010	Faculty and staff performance expectation plans for 2011 (and beyond) include revenue generation initiatives/goals as appropriate.
May 2010	Fee generation plan and implementation timeline are monitored, evaluated and adjustments made as needed.

YEAR 2 - July 1, 2010–June 30, 2011:

July 2010 – June 2011	Program Directors lead the process to determine cost analysis and fee establishment where appropriate for an additional 40 percent of their programs, by the end of year 2 a minimum of 60% of programs will have been reviewed.
October 2010	Recommended Distribution begins to be implemented by faculty and staff for MU Extension fee-based programs OR statewide programs where base fees have been designated. Fees collected at the host (county, department) level start to show a return to the University/State level of Extension, based upon the state fee structure in place at that time and calculated recommended distribution. Hosts are asked to consider whether they could meet a target of 50 percent of the calculated recommended distribution computed through the use of the "Fee Generation Worksheet". If they can reasonably meet that target they remit such funds to MU Extension. If meeting a target of that nature would pose financial issues at the local level hosts are asked to make specific plans regarding how they will begin to make remittances in the future.
December 2010	Fees Committee reconvenes to evaluate and make adjustments to the plan as needed.

YEAR 3 - July 1, 2011–June 30, 2012:

July 2011-June 2012	Program Directors lead the process to determine cost analysis and fee establishment where appropriate for remaining programs. Incentive program/s are developed.
October 2011	Fees collected at the host (county, department) level continue to show a return to the University, based upon the state fee structure.
June 2012	Program Directors have completed meetings with regional and state faculty and staff and stakeholders to determine cost analysis and fee establishment for 100 percent of programs. It is understood that the base fee established for some programs will be $0. The expectation is that the review and analysis have been done to defend why programs have the base fee they have whether it is $0 or any other fee. Fee generation plan and implementation timeline is monitored, evaluated and adjustments made as needed.

ONGOING ACTIONS:

- Annually, MU Extension has an obligation to provide information to faculty, staff, councils and clients regarding revenue generation by fees and the expenditures supported by fees.

- Fees established for programming are reviewed regularly to determine appropriate adjustments. For ongoing programs, this analysis is done annually. Stakeholders involved in setting the base fee are represented in the review process when significant adjustments are desired.

- Contract personnel are hired as funds become available for personnel support.

- Positions are filled as sustainable funds become available.