

**Engagement Leadership Council
January 19, 2017 (2:00 - 3:15 p.m.)
902 Prices Fork Road, Suite 120
GATEWAY – Large Conference Room
MEETING HIGHLIGHTS**



Participants:

Don Back, Language and Culture Institute
David Close, Commission on Outreach and International Affairs
Martin Daniel, Research
Shelly Jobst, Continuing and Professional Education
Gary Kirk, VT Engage
Laterrian McBrewer, College of Engineering
Penny McCallum, Virginia Tech Southwest Center
Linda Oldham, Pamplin College of Business
Susan Short, Engagement
Debra Stoudt, College of Liberal Arts & Human Sciences
Scott Tate, Economic Development
Brenda Van Gelder, Information Technology
Scott Weimer, Strategic Partnerships and Program Development
Stacey Wilkerson, Engagement

Meeting Highlights:

Susan Short provided a welcome and facilitated introductions. She shared information related to the “call for proposals” for the 2017 Engagement Scholarship Consortium annual conference to be held in Birmingham, Alabama September 26-27, 2017. The submission deadline for presentations and posters is March 15, 2017. Go to: <https://engagementscholarship.org/upload/conferences/2017ESC-call-for-proposals.pdf>.

Susan reminded the group about access to various conference incentive funds. These include the COTA Small Grants program (to support programs delivered at The Hotel Roanoke & Conference Center) and Inn Incentive funds (focused on new program delivery at the Inn at Virginia Tech & Skelton Conference Center). Program planners are encouraged to work directly with Continuing and Professional Education faculty members to apply for these resources.

Stacey Wilkerson provided a brief overview of the Scholarship of Engagement and shared a draft survey designed to gather examples of best practices, broader impacts, and stories of awesomeness. The survey seeks to gather information from all colleges and will be used for website spotlights, annual reports, and future Carnegie Engagement

Classification submissions. Several suggestions were generated from the group. These included: need to include definitions of the *scholarship or engagement* within the survey; the group would like to gather both domestic and international examples; it might be helpful to separate undergraduate from graduate program reporting; perhaps the survey should include links that provide examples of the *scholarship of engagement*. It will be helpful to connect examples to experiential learning and to include examples of community and organizational impacts.

Scott Weimer provided an overview and responded to questions regarding the new rate schedule for Continuing and Professional Education (see attachments).

Participants provided program updates. These included:

Linda Oldham announced that the university will host the Health Care Analytics Symposium (focused on telemedicine in southwest Virginia) April 1, 2017. Featured programs represent capstone projects in partnership with Carilion.

Scott Tate announced that the Office of Economic Development has secured EDA Center funding to support regional economic development efforts in Hampton Roads/Eastern Virginia.

Brenda Van Gelder shared that through a collaboration between the division of Information Technology and GoGig, that Wi-Fi networks in downtown Blacksburg and the international edu roam network have been merged. This service makes it easier for students, faculty, and staff to move between campus and downtown.

The meeting adjourned at 3:15 p.m.

Meetings for 2017:

(All meetings will be held from 2 - 3:15 p.m. at 902 Prices Fork Road, Suite 120, unless otherwise noted):

March 2, 2017

June 1, 2017

September 7, 2017

December 7, 2017

Respectfully submitted by:

Susan E. Short, Associate Vice President for Engagement

University Pricing Structure for Continuing and Professional Education FY2017

This document amplifies information included in the University's Policy on Continuing Education (Policy No. 6362) and provides the most recent pricing structure and service list.

Introduction

Continuing and Professional Education (CPE) is an administrative unit of Outreach and International Affairs supporting the university-wide mission to advance engagement responsibilities of the university. CPE provides services related to the design, development, and delivery of professional courses, meetings, and conferences that are intended to address the needs of nontraditional learners by fostering the exchange of knowledge and experience through its programs and collaborating with Virginia Tech faculty and external partners to address the diverse needs of professionals, organizations, and communities.

A few examples of how colleges, departments, and faculty benefit from collaborating with CPE include:

- Providing an avenue for dissemination of research findings
- Assisting faculty in reaching engagement goals
- Providing additional revenue streams for faculty and departments

The university pricing structure for continuing education and other engagement initiatives requires that revenues be collected for all direct program costs (instruction, meeting space, materials, food, labs, etc.) and for the administrative/service costs of the program. The administrative/service costs are recovered through a service fee applied by Continuing and Professional Education to each program. CPE will share revenue with academic departments and Commonwealth Campus Centers on a programmatic basis to facilitate program development.

The director of Continuing and Professional Education will review these pricing guidelines annually. Revisions to pricing guidelines are made in coordination with the associate vice president for Engagement and the vice president for Outreach and International Affairs. Revisions are presented to the Virginia Tech Engagement Leadership Council for dissemination within the colleges, research centers, and administrative units of the university. If changes to the pricing guidelines are necessary, changes will take effect for programs scheduled for delivery in the next fiscal year, on or after July 1, and will remain in effect until June 30 of the following year. Future year budgets will include a 3% annual projected increase to the current year rates. Questions or concerns about any feature described in this document should be sent to the director of Continuing and Professional Education.

Definitions

University Policy Guidelines on Continuing and Professional Education (Policy No. 6362)

Academic colleges, centers, and administrative units designing and delivering continuing and professional education activities, both on and off campus, under the auspices of the Virginia Tech brand are required to work with Continuing and Professional Education for the collection of program revenues when external audiences are involved. This includes work conducted by academic faculty in Blacksburg, as well as academic faculty delivering continuing education programs at university locations outside of Blacksburg. Exceptions to this policy must be mutually agreed upon by the director of Continuing and

Professional Education and the appropriate dean or administrative head designated by the college or administrative unit.

Continuing and Professional Education is one of the university's academic outreach units. The promotion and servicing of all continuing education activities, including those activities supported through the Office of Sponsored Programs and contracts that are conducted under the auspices of or co-sponsored by the university or any of its sub-units, are the responsibility of Continuing and Professional Education. Programs generated by Virginia Cooperative Extension are an exception to the policy. Servicing includes contractual arrangements for meeting and support services which become a university obligation by sponsorship. Continuing and Professional Education is responsible for the collection and disbursement of fees associated with university sponsored or co-sponsored continuing education activities. While fees are collected typically for these activities, some programs have other sources of financial support.

Development and administration of programs include verification of needs, scheduling, budgeting, marketing, collecting and accounting for fees, general instructional support, and logistical assistance as required. The granting of continuing education units (CEUs) and the maintenance of records relating to continuing education units are the exclusive responsibility of CPE personnel unless otherwise designated by the director of Continuing and Professional Education and the appropriate dean or administrative head designated by the college or administrative unit.

University Sponsorship

University sponsorship (sponsored, co-sponsored, in cooperation with) is defined as an official function of the university and is granted to programs which support the mission of the university. By granting sponsorship, the university officially sanctions use of university resources to support the program. Programs delivered through CPE typically involve university support that may include the use of university space, personnel, equipment and other resources. Any contractual relationships related to programs must have the legal support of the university. Contracts with non-VT parties must be reviewed and approved by University Legal Counsel and signed by either the director of Continuing and Professional Education, the associate vice president for Engagement, or the vice president of Outreach and International Affairs, as designated, in accordance with University Policy 3015 – University Contract Signature Policy and Procedures (<http://www.policies.vt.edu/3015.pdf>).

University sponsorship has several implications. First, university resources can be legally committed to the program. Without such sponsorship, faculty/staff would be required to take annual leave for all development, coordination, and instructional involvement; and university property or other resources could not be used. Second, all contractual relationships have the legal support of the university. Without official university contractual approval, university/Commonwealth employees who sign contracts may become personally liable for meeting contractual obligations. If a contractual conflict occurs, the assets of the individual could be used to satisfy debts. Third, university sponsorship connotes the ability to respond to program attendees with university resources to meet requirements such as those under the Americans with Disabilities Act. Finally, university sponsorship implies that all marketing materials and plans are subject to review and approval to ensure alignment with university policy and branding guidelines.

Use of University Facilities

When planning a continuing and professional education program or university supported conference/meeting in Blacksburg, university personnel are required to use university or auxiliary enterprise facilities and services (e.g., the Inn at Virginia Tech and Skelton Conference Center) or, if the conference is in Roanoke, at VT affiliated entities such as the Hotel Roanoke and Conference Center (HRCC) or the Virginia Tech Roanoke Center. For programs in the National Capital Region, program developers and VT personnel should utilize Virginia Tech's facilities including the Executive Briefing Center, Northern Virginia Center, and Language and Culture Institute. Commonwealth Campus Center (CCC) facilities should be utilized whenever possible when delivering statewide programs. In the event university-owned or affiliated facilities or services are unavailable because of prior program commitments or, if there is mutual agreement between the sponsoring university entity and either CPE or university facility to pursue another venue, alternate arrangements may be made.

Types of Clients

- Internal Clients

A client is considered internal when the university (academic or administrative department) is a signatory of the negotiated program budget agreement/contract and may share in revenue or loss of a program.

- External Clients

A client is considered external when they represent an organization not affiliated with the university. While the pricing for external clients may be negotiable, pricing should not be lower than the published rates and guidelines for internal clients.

Programs and Services

- Contract Programs

Contract programs (credit and non-credit) are delivered for a specific audience at a client's site of choice. They include workshops, seminars, or conferences that are offered to companies, organizations, or agencies on a contractual basis. CPE can provide a full array of services for these types of programs. Contract programs may be designed to only recover costs or to return revenue to the client after program expenses are paid. Planned and unplanned surplus is shared with the client. Please refer to Appendix A for more details on non-credit contract programs. For information on credit contract programs, please reference Policy No. 6363 and contact the director of Continuing and Professional Education.

- Open Enrollment Programs

Open enrollment programs (non-credit) refer to workshops, seminars or conferences that are supported by individual participant registration fees and may be fully or partially underwritten through grants or sponsorships. Planned and unplanned surplus is shared with the client. Please refer to Appendix B for more details on open enrollment programs.

- Custom Program Development, Management, and Implementation Consulting

Custom services may include program design/development, logistics, communication & creative services, enrollment, technical, or financial services that fall outside the traditional contract or open enrollment program models. Pricing for these services is highly customized.

Description of Fees, Costs, Surplus, and Assumption of Risk

Continuing and Professional Education Service Fee

This fee is applied to program budgets to recover administrative/service costs. The service fee is a per person cost, a percentage applied to direct program expenses, or an hourly rate for custom projects. Depending on the types of services required, additional premium fees could apply. Please see Appendix B for additional information on CPE service packages.

Program Costs

Program budgets include direct and indirect program expenses. Direct program costs refer to expenses such as: food, lodging, marketing, instruction, materials, travel, honoraria, program support services, and college/department administrative costs. Payment handling fees and planned surplus are examples of costs that are typically excluded from the service fee percentage.

Surplus Funds

Surplus is defined as revenue after all program expenses are paid. Surplus funds, whether planned or unplanned, are typically shared on an 80/20 basis with internal clients (depending on assumption of risk), where 80% is distributed to the client and 20% is retained by CPE. Surplus distribution for external clients is negotiated on a case-by-case basis.

Assumption of Risk

Risk is defined as revenue loss that may occur due to a program cancellation, where costs such as program planning, print promotions, website development, mailings, and materials have been incurred, or when a program is held and expenses exceed revenue. For open enrollment programs, 100% of the loss is assumed by the internal/external client, unless otherwise negotiated in advance. If there is a loss on a contract program, the internal/external client pays the CPE service fee and all expenses incurred by CPE on behalf of the program. Internal/external clients who contract for specialized services with CPE assume 100% of the risk.

If an open enrollment or contract program cancels, internal clients will incur a minimum \$500 cost recovery fee in addition to any expenses incurred by CPE on behalf of the program.

For external clients only, if an open enrollment or contract program cancels, CPE will charge a minimum \$1,000 program cancellation fee in addition to any expenses incurred by CPE on behalf of the program.

Appendix A

Non-credit Open Enrollment Programs

CPE Registration Only Packages

Internal or External Clients

(Effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017; External Client rates are effective January 1, 2017)

Registration Package A – Online Registration Only

\$20 per person (\$500 minimum)

- Standard Public View Registration Page or Link (if using client webpage)
- Processing of online credit card payments
- Processing cancellations and refunds (additional cancellation and refund fees will apply)
- Two program participant lists provided: one pre-event and one post-event (Name and Affiliation only)
- “Know Before You Go” letter creation and electronic distribution (content provided by client in template provided by CPE)
- Online registration only

Registration Package B – Online Registration w/ Expanded Payment Handling

\$25 per person (\$500 minimum)

- Standard Public View Registration Page or Link (if using client webpage)
- Processing of online credit card payments
- Processing of registration payments via mail, fax, or online (payment types include: credit card, check, HokieMart)
- Phone point of contact for participants with questions or concerns regarding registration
- Processing cancellations and refunds (additional cancellation and refund fees will apply)
- Two program participant lists provided: one pre-event and one post-event (Name and Affiliation only)
- Nametags included, sent to client for distribution
- “Know Before You Go” letter creation and electronic distribution (content provided by client in template provided by CPE)
- Onsite registration available (\$50/hour, plus travel expenses).

CPE Program Management Packages

(Effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017; External Client rates are effective January 1, 2017)

Program Management Package - Standard

Internal clients - \$38 per person or 34% of direct costs (whichever is greater)

External clients - \$45 per person or 34% of direct costs (whichever is greater)

{Registration}

- Standard Public View Registration Page - or – Template Website (choose from 1 of 4 designs)
- Processing of online credit card payments
- Processing of registration payments via mail, fax, or online (payment types include: credit card, check, HokieMart)
- Phone point of contact for participants with questions or concerns regarding registration
- Processing cancellations and refunds (additional cancellation and refund fees will apply)
- Two program participant lists provided: one pre-event and one post-event (Name and Affiliation only)
- Standard nametags included
- Coordination of banquet and drink tickets
- “Know Before You Go” letter creation and electronic distribution (content provided by client in template provided by CPE)
- Onsite support* – one CPE staff member per 200 participants, for up to four (4) hours. Additional staffing may be requested/recommended at \$50/hour plus travel expenses.

{Planning and Coordination}

- Provide program/event management consultation and budget (includes up to ten (10) hours for in-person planning meetings and/or conference calls; includes up to three (3) budget revisions)
- Assist with date and site selection (up to three (3) sites/venues researched)
- Manage contract negotiation and legal review for on campus and off-campus vendors/venues/services
- Arrange audio visual services
- Coordinate facility setups for on and off campus venues
- Arrange food and beverage with venue (CPE does not provide catering)
- Arrange on and off-campus accommodations
- Provide up to ten (10) speaker payments
- Provide up to ten (10) domestic travel reimbursements
- Reserve local transportation and conduct driving checks (drivers must be identified separately; does not include direct cost to conduct driver checks)
- Order gift and/or promotional items (storage of materials post-event is not available)
- Arrange program material shipping and delivery
- Serve as single contact for on or off-campus vendors/venues/services
- Coordinate parking arrangements (additional fees may apply for parking)
- Hiring wage personnel for programs

- Onsite coordination (if required)* - one CPE staff member for up to four (4) hours. Additional staffing costs may apply depending upon needs of the program (travel costs extra).

* Programs with more than 200 participants, or for programs delivered outside of a 50-mile radius of Blacksburg, may require additional staffing and will be determined by CPE at a rate of \$50 per hour per CPE staff member (plus travel expenses).

{Creative Services}

- Planning and Campaign Development (up to four (4) hours)
 - Develop a basic creative services campaign
 - Develop a basic social media plan (client implementation)
- Graphic Design and Print Development (up to ten (10) hours)
 - Layout development for program materials (e.g., program, agenda, handouts, posters, flyers, etc.,)
 - Photo selection
- Content Coordination (up to 3 hours)
 - Client-provided content prepared for print, electronic materials, and website
 - Content updates/editing (with approval from client)
- Email Marketing (up to 4 mailings)
 - List management from up to 4 interest areas from existing CPE lists
- Printing Services (printing at cost)
- Mailing Services Coordination (postage and labor at cost; mailing list must be provided electronically as an Excel file)

(Note) Listed services requiring additional hours of work will incur a labor charge of \$75 per hour. CPE will request client approval through a change order for any additional hours required prior to initiating work.

{Financial}

- Management of program accounting and financial activity, payment of invoices, funds handling
- Ensure program complies with university, state, and federal policies
- Process accounts receivable invoices
- Financial settlement and reporting at program close

{Other}

- Additional staffing will incur additional hourly labor charges of \$50 per hour/per person, and is based on availability. Client to pay for all direct costs associated with additional staffing (e.g., meals, lodging, travel, etc.)

Services other than those specifically listed are not included in any of the packages but may be provided at an additional charge. Please inquire about any services that are not listed but may be necessary for your program.

Program Management Package - Expanded

Internal clients - \$48 per person or 34% of direct costs (whichever is greater)

External clients - \$55 per person or 34% of direct costs (whichever is greater)

{Registration}

- Standard Public View Registration Page with Template Website (choose from 1 of 4 designs)
- Processing of online credit card payments
- Processing of registration payments via mail, fax, or online (payment types include: credit card, check, HokieMart)
- Phone point of contact for participants with questions or concerns regarding registration
- Processing cancellations and refunds (additional cancellation and refund fees will apply)
- Two program participant lists provided: one pre-event and one post-event (Name and Affiliation only)
- Standard nametags included
- Coordination of banquet and drink tickets
- "Know Before You Go" letter creation and electronic distribution
- Onsite coordination (if required)* - one CPE staff member for up to eight (8) hours. Additional staffing costs may apply depending upon needs of the program (travel costs extra).

{Planning and Coordination}

- Provide program budget consultation and development
- Assist with date and site selection (up to 5 sites/venues researched)
- Manage contract negotiation and legal review for on campus and off-campus vendors/venues/services
- Arrange audio visual services
- Coordinate facility setups for on and off campus venues
- Arrange food and beverage with venue (CPE does not provide catering)
- Arrange on and off-campus accommodations
- Provide up to thirty (30) speaker payments
- Provide up to thirty (30) domestic travel reimbursements
- Reserve local transportation and conduct driving checks (drivers must be identified separately; does not include direct cost to conduct driver checks)
- Order gift and/or promotional items (storage of materials post-event is not available)
- Arrange program material shipping and delivery
- Coordinate domestic staff and speaker travel arrangements
- Coordinate domestic program excursions, field trips, and tours
- Pre-Program material assembly (on-site material assembly is quoted as a premium service)
- Coordinate and arrange poster session logistics
- Develop exhibitor package (from existing template) and manage on-site exhibitor area
- Serve as single contact for on or off-campus vendors/venues/services
- Coordinate parking arrangements (additional fees may apply for parking)
- Hiring wage personnel for programs
- Development of program sponsorship packages (from existing template)

- Onsite coordination (if required)* - one CPE staff member for up to eight (8) hours. Additional staffing costs may apply depending upon needs of the program (travel costs extra).

* Programs with more than 200 participants, or for programs delivered outside of a 50-mile radius of Blacksburg, may require additional staffing and will be determined by CPE at a rate of \$50 per hour per CPE staff member (plus additional travel costs).

{Creative Services}

- Planning and Campaign Development (up to ten (10) hours)
 - Develop a creative services campaign
 - Develop a social media plan (client implementation)
- Graphic Design and Print Development (up to fifteen (15) hours)
 - Layout development for program materials (e.g., program, agenda, handouts, posters, flyers, etc.,)
 - Photo selection
- Content Coordination (up to eight (8) hours)
 - Client-provided content prepared for print, electronic materials, and website
 - Content updates/editing (with approval from client)
- Email Marketing (up to eight (8) mailings)
 - List management from up to four (4) interest areas from existing CPE lists
- Printing Services (printing at cost)
- Mailing Services Coordination (postage and labor at cost; mailing list must be provided electronically as an Excel file)

(Note) Listed services requiring additional hours of work will incur a labor charge of \$75 per hour. CPE will request client approval of the additional number of hours required prior to initiating work.

{Financial}

- Management of program accounting and financial activity, payment of invoices, funds handling
- Ensure program complies with university, state, and federal policies
- Process accounts receivable invoices
- Financial settlement and reporting at program close

{Other}

- Additional staffing will incur additional hourly labor charges of \$50 per hour/per person, and is based on availability and approval.
- Client to pay for all costs associated with additional staffing (e.g., meals, lodging, travel, etc.)

Services other than those specifically listed are not included in any of the packages but may be provided at an additional charge. Please inquire about any services that are not listed but may be required for your program.

Additional Fees

(Effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017; External Client rates are effective January 1, 2017)

In addition to package fees, the following fees will apply:

- Any payment handling, CEU, and premium service fees that apply
- A minimum service fee will apply

Client Risk/Surplus

(Effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017; External Client rates are effective January 1, 2017)

- Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client.
- CPE will charge a minimum \$500 cost recovery fee (internal clients) or minimum \$1,000 program cancelation fee (external clients) in addition to any expenses incurred by CPE on behalf of the program.

Appendix B

Non-credit Contract Programs

Internal Client Service Fee

(Effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017)

Greater of:

- 34% on all direct program costs, excluding food and lodging - OR -
- 22.5% of contract amount, including CPE service fee
- Plus any payment handling, CEU, and premium service fees that apply
- A minimum service fee will apply (calculated at 95% of anticipated CPE service fee)

Internal Client Risk/Surplus

- Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client.
- CPE will charge a minimum \$500 cost recovery fee in addition to any expenses incurred by CPE on behalf of the program.

External Client Service Fee

(Effective for external Virginia Tech clients January 1, 2017)

Greater of:

- 34% on all direct program costs, excluding food and lodging - OR -
- 22.5% of contract amount, including CPE service fee
- Plus any payment handling, CEU, and premium service fees that apply
- A minimum service fee will apply

External Client Risk/Surplus

- Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client.
- CPE will charge a minimum \$1,000 program cancellation fee in addition to any expenses incurred by CPE on behalf of the program.

Appendix C

CPE Premium Services

Listed Registration, Planning and Coordination services requiring additional hours of work will incur a labor charge of \$50 per hour. CPE will request client approval of the additional number of hours required prior to initiating work.

Registration Services

- Additional onsite registration services (\$50 per hour – plus travel expenses)

Financial Services

- Specialized financial management services (\$50 per hour)

Planning and Coordination Services

- International travel arrangements and document management
- International invitation letters
- Background checks for programs with minors and J-1 VISAs
- Policy compliance when working with minors
- Abstract management (support labor + software cost)
- Contract-only program – negotiation and signing (\$1,000 per contract)
- Speaker payments (in excess of # indicated in package)
- Coordinate domestic staff and speaker travel arrangements
- Coordinate domestic program excursions, field trips, and tours
- Pre-Program material assembly (on-site material assembly is quoted as a premium service)
- Coordinate and arrange poster sessions
- Development of sponsorship packages
- Development of exhibitor packages
- Specialized funds management (payments and invoices)
- Lodging list management
- Export Control / ITAR specialized program support
- Agenda development (includes program editing, scheduling, room assignments, etc.)
- Volunteer Coordination
- Emergency Management Plan development
- Information/Help Desk staffing – hourly charge
- Contracting and management of conference/program app – hourly charge + direct cost of app

Creative Services

Listed Creative Services requiring additional hours of work will incur a labor charge of \$75 per hour. CPE will request client approval of the additional number of hours required prior to initiating work.

- Planning and Campaign Development
 - Develop a creative services campaign
 - Develop a social media plan

- Staff social media plan implementation
- Graphic Design and Print Development (quoted per hour)
 - Layout development for program materials (e.g., program, agenda, handouts, posters, flyers, etc.,)
 - Photo selection
 - Custom logo design
 - Advertising (plus cost of ad)
 - Custom name tag design – (quoted per hour – nametags printed at cost)
- Content Development (quoted per hour)
 - Content development for print, electronic materials, and website
 - Content updates/editing
- New Mailing List Development (quoted per hour – lists purchased at cost)
- Expanded Website Development (up to 8 hours)
 - Custom layout design
 - Additional plug-ins
 - Up to ten (10) custom pages
- On-site photography – hourly charge
- Miscellaneous Creative Services
- Certificates
 - Standard printing – Non-CEUs (\$10 per person)
 - Custom printing (\$10 per person + \$150 setup fee)
 - Standard printing for CEUs (\$15 per person)
 - Standard printing and folio (\$8 per person)
 - Standard printing and frame, mat, seal, ribbon (\$45 per person)
 - Custom printing and frame, mat, seal, ribbon (\$45 per person + \$150 setup fee)
 - Gold seal (\$1 per person- minimum 15)
 - Custom signature fields (\$150 setup fee)

Appendix D

CPE Consulting

Continuing and Professional Education can provide a custom designed solution to meet program needs that do not fall into any of the above categories. A scope of services agreement will be developed in consultation with the client that defines deadlines, areas of mutual responsibility, and project deliverables. CPE fees will be based on an hourly charge with a “not to exceed” estimate for the number of hours and a minimum service fee. A change order will be issued and added to the agreement if additional consulting hours are required due to changes in deadlines, project scope, or deliverables.

CPE Custom Project Fee

(Effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017; External Client rates are effective January 1, 2017)

- \$50 per hour - may be applied as % of salary time on sponsored grants and contracts
- Plus any payment handling, CEU, and premium service fees that apply
- A minimum service fee will apply (calculated at 95% of anticipated CPE service fee)

Appendix E

Continuing Education Unit (CEU) Guidelines and Fees

One Continuing Education Unit is defined as ten contact hours of educational experience in an organized setting under qualified instruction. They may be used as an attainment measure toward professional certification or licensure, but in general do not apply as college credit. CEUs are optional, but when awarded, proof of attendance is required by the client or instructor, and CEUs must be provided to all participants successfully completing the course, without exceptions.

Internal Clients

Contract and open enrollment programs that offer CEUs through Virginia Tech CPE are subject to the internal client service fee plus a minimum CEU fee of \$15 per participant (which includes basic certificates of completion). Programs that require CPE administration and support of other professional accreditation (such as PDH, APA, AIA, CME) are subject to additional fees.

When CEUs are awarded as a specialized service and are not part of a contract or open enrollment program, the CEU fee is \$30 per participant (which includes basic certificates of completion). If fewer than 10 people are enrolled, a \$300 minimum fee will apply.

External Clients

Contract and open enrollment programs that offer CEUs through Virginia Tech CPE are subject to the external client service fee plus a minimum CEU fee of \$25 per participant (which includes basic certificates of completion). Programs that require CPE administration and support of other professional accreditation (such as PDH, APA, AIA, CME) are subject to additional fees.

When CEUs are awarded as a specialized service and are not part of a contract or open enrollment program, the CEU fee is \$50 per participant (which includes basic certificates of completion). If fewer than 10 people are enrolled, a \$500 minimum fee will apply.

CPE Pricing Guidelines – Proposed Revisions - Summary

The most recent changes to the Continuing and Professional Education pricing guidelines were made back in Fiscal Year 2010 and the current CPE service fees were kept flat between FY2010-FY2016. CPE is a cost recovery unit and must account for the majority of its own operating budget, including salary and fringe increases. This has necessitated the need for an increase in cost recovery service fees at this time to cover current operating expenses and an unexpected 25% increase in the cost of fringe benefits.

Summary of Changes to Pricing Guidelines

- CPE is transitioning from a one-price, one-size-fits-all model, to a pricing structure where services are broken out in packages and our clients will have more options to select the level of service that corresponds to their program needs.
- Minimum service fees and cancellation fees are being standardized.
- CPE has included a list of Premium Services that can be contracted at an hourly rate, either on their own, or, used to supplement a registration-only or program management package.
- The new pricing guidelines will be effective for internal Virginia Tech clients for newly budgeted programs scheduled to begin on or after July 1, 2017.

Non-credit Contract Programs

Current Pricing	Proposed Pricing
<p>[Internal Clients] Greater of:</p> <ul style="list-style-type: none"> • 27% on all direct program costs, excluding food and lodging - OR - • 17% of contract amount, including CPE service fee • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee <p>Internal Client Risk/Surplus:</p> <ul style="list-style-type: none"> • Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client. 	<p>[Internal Clients] Greater of:</p> <ul style="list-style-type: none"> • 34% on all direct program costs, excluding food and lodging - OR - • 22.5% of contract amount, including CPE service fee • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee will apply <p>Internal Client Risk/Surplus:</p> <ul style="list-style-type: none"> • Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client. • If a contract program cancels, internal clients will incur a minimum \$500 cost recovery fee in addition to any expenses incurred by CPE on behalf of the program.
<p>[External Clients] Greater of:</p> <ul style="list-style-type: none"> • 27% on all direct program costs, excluding food and lodging - OR - 	<p>[External Clients] Greater of:</p> <ul style="list-style-type: none"> • 34% on all direct program costs, excluding food and lodging - OR -

<ul style="list-style-type: none"> • 17% of contract amount, including CPE service fee • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee <p>External Client Risk/Surplus:</p> <ul style="list-style-type: none"> • Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client. 	<ul style="list-style-type: none"> • 22.5% of contract amount, including CPE service fee • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee will apply <p>External Client Risk/Surplus:</p> <ul style="list-style-type: none"> • Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client. • CPE will charge a minimum \$1,000 program cancelation fee in addition to any expenses incurred by CPE on behalf of the program.
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Non-credit Open-Enrollment Programs – REGISTRATION ONLY

Current Pricing	Proposed Pricing
<p>[Internal or External Clients]</p> <p>Registration Only \$20 per person (\$500 minimum)</p> <ul style="list-style-type: none"> • Package Not Defined 	<p>[Internal or External Clients]</p> <p>Registration Package A – Online Registration Only \$20 per person (\$500 minimum)</p> <p>Registration Package B – Online Registration w/ Expanded Payment Handling \$25 per person (\$500 minimum)</p>

Non-credit Open-Enrollment Programs – CPE Program Management Packages

Current Pricing	Proposed Pricing
<p>[Internal Clients]</p> <p>Greater of:</p> <ul style="list-style-type: none"> • 27% on all direct program costs, excluding food and lodging - OR - • Applicable CPE Program Management package per person price (see below) • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee will apply 	<p>[Internal Clients]</p> <p>Greater of:</p> <ul style="list-style-type: none"> • 34% on all direct program costs, excluding food and lodging - OR - • Applicable CPE Program Management package per person price (see below) • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee will apply

Internal Client Risk/Surplus:

- Planned and unplanned surplus is shared 80% to college, 20% to CPE, unless otherwise stated in budget agreement.
- Any program losses will be assumed 100% by the client, unless otherwise stated in budget agreement.

CPE Standard Per Person Fee

\$30 per person

(Package Not Specified – One Price for All Services)

[External Clients]

Greater of:

- **27% on all direct program costs**, excluding food and lodging - OR -
- **\$30 per person**
- Plus any payment handling, CEU, and premium service fees that apply
- A minimum service fee

External Client Risk/Surplus:

- Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client.

Internal Client Risk/Surplus:

- Planned and unplanned surplus is shared 80% to college, 20% to CPE, unless otherwise stated in budget agreement.
- Any program losses will be assumed 100% by the client, unless otherwise stated in budget agreement.
- If an open-enrollment program cancels, internal clients will incur a minimum \$500 cost recovery fee in addition to any expenses incurred by CPE on behalf of the program.

Program Management Package - Standard

\$38 per person

Program Management Package - Expanded

\$48 per person

[External Clients]

Greater of:

- **34% on all direct program costs**, excluding food and lodging - OR -
- **Applicable CPE Program Management package per person price (\$45 per person - standard package; \$55 per person - expanded package)**
- Plus any payment handling, CEU, and premium service fees that apply
- A minimum service fee will apply

External Client Risk/Surplus:

- Planned and unplanned surplus will be determined on a case-by-case basis. Any program losses and the CPE service fee will be assumed 100% by the client.
- CPE will charge a minimum \$1,000 program cancelation fee in addition to any expenses incurred by CPE on behalf of the program.

CPE Custom Program Development, Management, and Implementation Consulting

Current Pricing	Proposed Pricing
<p>[Internal or External Clients]</p> <p>No Language in Current Guidelines</p>	<p>[Internal or External Clients]</p> <p>CPE Custom Project Fee</p> <ul style="list-style-type: none"> • \$50 per hour - may be applied as % of salary time on sponsored grants and contracts • \$75 per hour for Creative Services - may be applied as % of salary time on sponsored grants and contracts • Plus any payment handling, CEU, and premium service fees that apply • A minimum service fee will apply