

ED COMMITTEE #3
October 27, 2008
Update

MEMORANDUM

October 23, 2008

TO: Education Committee

FROM: Essie McGuire, Legislative Analyst *Essie McGuire*

SUBJECT: **Update – MCPS Curriculum Fee Policy**

Today the Education Committee is scheduled to receive an update on the status of the review of curriculum fees in the Montgomery County Public Schools (MCPS). Stephen Bedford, Chief School Performance Officer, MCPS, and Dr. Marshall Spatz, Director, Office of Management, Budget, and Planning, MCPS, will be present to brief the Committee and answer any questions.

At the beginning of this school year, the Council received many questions and concerns from constituents regarding fees charged by schools for curricular and other classroom materials and activities.

MCPS is currently conducting a review of existing fee practices and guidelines, as requested by the Board of Education. In response to Council staff questions, MCPS provided the overview information on circles 1-2 for the Committee's discussion today. This overview details the review process and timeline on circle 1, and reports that the review workgroups anticipate concluding their review in time for any recommendations to be incorporated into next year's budget. The Education Committee will likely be interested in returning to the issue following completion of the Board's review, to understand the implications for FY10 and subsequent budgets.

Current Policy

Board of Education Policy JNA, *Curricular Expenses for Students*, and the associated MCPS Regulation JNA-RA, *Curricular Expenses for Students*, are attached at circles 3-5. The policy specifies that MCPS provides all students with full access to courses and materials regardless of economic circumstances. It does provide that students may be requested to purchase supplemental materials, but that students may not be denied "reasonable access" to materials or be "penalized academically" for inability to pay for materials.

The regulation specifies that each school must inform parents and students of course-related fees and of “the availability of alternative payment arrangements, including possible waiver of fee” (circle 5).

Current Practice

Fees for curricular materials are set school by school, but may not exceed the approved maximums set by MCPS centrally (circle 1). MCPS states that schools are requested to review their fees each year.

Because the fees are set school by school individually, it is difficult to compare representative samples of fees across schools for similar materials. After examining available material on middle and high school websites, Council staff offers the following observations about the types of fees that are charged:

- Fees appear to range across all types of courses, from basic academics to electives.
- Fees appear to be usually higher in electives and upper level courses.
- Some examples of items requiring fees include: workbooks; lab fees; art supplies; calculators; atlases; student planners; transportation; food; disks and printing; and exam fees for AP and IB courses.
- Council staff generally found a statement on the website regarding possible financial assistance on request.

Many questions have centered around the intersection between curricular fees requested of students and the central textbook and supply budgets. MCPS states clearly (circle 2) that all required textbooks are provided by the school. Curricular fees appear to be targeted primarily toward consumables, such as workbooks, or items that will become the property of the student. It may be useful to more fully discuss this relationship and clarify how schools determine when fees are warranted as opposed to using centrally budgeted funds.

Another primary issue is how students are informed of possible waivers and what mechanisms exist to ensure students access materials and are not discouraged from enrolling in certain courses based on published fees. On circle 2, MCPS states that in addition to including written communication, school staff are expected to work with students and families to ensure access. Again, it may be useful to discuss how this process works and whether the MCPS review is expected to address this issue.

Curricular Fees

The Committee is interested in a general status report on this issue. We understand that MCPS is in the process of reviewing existing fee practices, and we are aware of the existing Board policy on fees. Please provide a process update on the review, its focus, and anticipated timeline. It would also be helpful for the Committee to understand how fees are established and authorized, how they differ from textbook and supply purchases made by schools, and what mechanisms exist to ensure access to materials if students cannot pay a fee. Do practices vary based on the level of school or course, such as elementary versus secondary, or required courses versus electives?

- ***Provide a process update on the review, its focus, and anticipated timeline***

The deputy superintendent of schools and the chief operating officer have been meeting with staff to examine the definition and guidelines for curricular fees. They also have established two workgroups, one for elementary schools and the other for secondary schools, to review the current practices and to make recommendations about what fees should be assessed, the amount of the fees, and the communication plan to ensure all students with financial need are aware of alternatives. The work of these groups should be completed by November 14, 2008, and recommendations will be made to the superintendent of schools at that time. This will allow the recommendations to be included in the Superintendent's Recommended FY 2010 Operating Budget. Information will be shared with the schools following the Board of Education's final action on the budget in February.

- ***How are fees established and authorized***

Fees are established by each school to support its educational program. Schools have requested students to purchase supplemental materials, including such items as workbooks, handbooks, dictionaries, atlases, and review guides. All students have to be provided with reasonable access to any materials that are suggested or recommended for purchase.

During 2003, when the offices of Curriculum and Instructional Programs and School Performance were implementing the revised Board of Education policy and regulation, a maximum allowable amount for each type of fee was established. Each year, schools were requested to review the fees they charged during the previous school year and determine if any changes were needed. If changes were requested, the fee was checked against the maximum amount allowed. If the fee was within the maximum, it was approved. If the fee exceeded the maximum, documentation was required to determine if an increase in the cost of the materials warranted an increase. If a new fee was requested, a review was conducted by the Office of Curriculum and Instructional Programs to determine the appropriateness of the material for which the fee was being requested and the appropriateness of the requested fee amount.

- ***How do curricular fees differ from textbook and supply purchases made by schools***

All textbooks required in courses are provided by the school. Curricular fees are used for supplemental materials, especially materials that are consumed by students and/or become the property of students.

- ***What mechanisms exist to ensure access to materials if students cannot pay a fee***

Each school must inform parents and students of course-related fees. The class/course-related fees list must be published in the schools' registration materials and other written communications to parents. These communications must clearly communicate the availability of alternative payment arrangements and the waiver of fees for families who are not able to afford them. In addition, counselors, teachers, and other school staff are expected to have processes to identify those students who cannot pay and ensure that they are not denied access to a class.

- ***Do practices vary based on the level of school or course, such as elementary versus secondary, or required courses versus electives?***

Yes, there are variances both by level and by types of courses. The highest use of fees is at the high school level, and the lowest usage is at the elementary level. There also is variance based on the course. The greatest number of current fees are for elective courses. Future practices will support consistent application of the definitions and guidelines for curricular fees. The work groups also will make recommendations about fee request, review, and approval practices.

POLICY

BOARD OF EDUCATION OF MONTGOMERY COUNTY

Related Entries: CND, JNA-RA, IPD-RA

Responsible Office: Chief Operating Officer

Curricular Expenses for Students

A. PURPOSE

To ensure that Montgomery County Public Schools provides all students, regardless of their economic circumstances, with full access to all courses, the instructional materials required for those courses, and the instructional program

To set forth the objectives to be followed with regard to student curricular expenses

B. POSITION

1. The school system shall provide:
 - a) Access to content material required to meet course outcomes
 - b) Safety equipment needed in all courses requiring such equipment
 - c) Three transcripts for each student without charge
2. It may be requested that students purchase supplemental materials. Reasonable access to supplemental materials may not be denied to any student.
3. Students will not be penalized academically for their inability to pay for curricular or supplemental materials.
4. Individual student projects become their personal property in courses such as family and consumer science, career and technology education, art, theater, and music. In such cases, curricular expenses may be charged. The cost will be established between the student and the teacher prior to starting the project, or it may be encompassed in a predetermined course fee.

5. If a student damages or breaks supplies or equipment through gross negligence, then the student is responsible for reimbursing the school system for the damage in accordance with regulation.
6. Lab fees may be charged, however, no student will be excluded from participation in any course requiring lab fees based on the inability to pay the fee.
7. Each school shall develop and publish a list of curricular expenses by course, subject area, or additional instructionally related items that has been approved by the appropriate Community Superintendent in accordance with regulation. The charges are to be fixed annually.
8. Schools are encouraged to provide field trips for their students that relate to the instructional program. Individual students may not be deprived of participating in field trips related to the instructional program based on an inability to pay the fee.
9. There are optional expenses that students may incur during their school years which are not related to curriculum and are the responsibility of the student. These expenses may include voluntary purchases such as athletic shoes, school newspapers, yearbooks, and class rings.

C. REVIEW AND REPORTING

This policy will be reviewed in accordance with the Board of Education policy review process.

Policy History: Resolution No. 792-71, December 14, 1971, reformatted in accordance with Resolution 333-86, June 12, 1986, and 456-86, August 12, 1986, accepted by Resolution No. 518-86, September 22, 1986; amended by Resolution No. 364-03, July 8, 2003.

REGULATION MONTGOMERY COUNTY PUBLIC SCHOOLS

Related Entries: IPD-RA, JNA, JOA-RA, JFA-RA

Responsible Office: Chief Operating Officer

Curricular Expenses for Students

I. PURPOSE

To set forth guidelines and procedures to be followed with regard to student expenses

II. BACKGROUND

- A. Students cannot be denied access to curricular materials required to meet course outcomes based on inability to pay required fees.
- B. It may be requested that students purchase supplemental materials, including such items as workbooks, handbooks, dictionaries, atlases, and review guides. All students must be provided with reasonable access to any materials that are suggested or recommended for purchase.

III. PROCEDURES

Each school must inform parents and students of course-related fees by generating a publication of all curricular expenses. The list of curricular expenses will be reviewed and approved by the appropriate community superintendent prior to publication.

The class/course-related fees list must be published in the schools' registration materials, or other school/family written communications. The following must be included:

- A. All curricular fees charged to students
- B. The availability of alternative payment arrangements, including possible waiver of fee
- C. All supplemental materials, such as workbooks, dictionaries, atlases, and review guides suggested for purchase by course
- D. Courses that require lab fees

Regulation History: Formerly Regulation No. 540-3, January 12, 1977 (directory information updated), revised December 1986; revised October 4, 1996; revised November 13, 2003.