

## FY 2016 Mandatory Fee Request Instructions

### Template #1 - Mandatory Fee Request Form

#### Section I

1. Each Mandatory Fee will require a separate Mandatory Fee Request Form. **(This form is required even if no increase is requested.)**
2. A list of common "fee types" is included on the Mandatory Fee Request Form. Please select "Other" for any mandatory fee type that is not included on this list (e.g.
3. Please select "yes" or "no" to indicate if the fee is to support a Public Private Venture (PPV).
4. Please select "new" or "existing" for fee.
5. Include the fund code and account code(s) used to track the revenue generate from the fee.
6. The current revenue should equal the most current budgeted revenues for FY2015. This amount should match Lettered Column C on the Financial Data (FD) sheet.
7. The Projected Fee Instances should match column K of the Detail of Revenue (DOR) sheet.
8. State the purpose and use of the fee. **Provide a detailed narrative to justify a new fee or a fee increase.**

#### Section II

9. Fill in the Reserves and Fund Balances amount for each the mandatory fees.
10. Provide explanation if % of revenue expended is less than 80%
11. Provide a narrative that explains the purpose of reserve and planned uses.

#### Section III

12. Please select "yes" or "no" to the questions. Provide explanations to responses, as appropriate.

### Template #2 - Financial Data Form

1. The Financial Data Sheet provides a trend of revenues and expenditures for the mandatory fees. **(This form is required even if no increase is requested.)**
2. Each Mandatory Fee will need a separate Financial Data Sheet.
3. List out Other Non-Fee Revenue individually.

### Template #3 - Detail of Revenue Projections

1. The Detail of Revenue Projections sheet provides an estimate on the number of students paying the particular Mandatory Fee. **(This form is required even if no increase is requested.)**
2. Each Mandatory Fee will need a separate Detail of Revenue Projection Sheet.

Completed forms are due to the System Office on December 12, 2014. The forms should be sent to the Budget Office at [budget.office@usg.edu](mailto:budget.office@usg.edu) with a copy to your assigned budget analyst.

## Mandatory Fee Request Form

Fiscal Year 2016

<b>Institution Name:</b>	Georgia Institute of Technology
<b>Preparer/Contact Information:</b>	Daphne Bronner(404-385-4393) daphne.bronner@business.gatech.edu

### Section I

<b>Name of Fee:</b>	Technology Fee		
<b>Type of Fee:</b>	Technology	<b>PPV Fee?</b>	No
<b>New fee or existing fee?</b>	Existing		
<b>Fund Code:</b>	10016	<b>Account Code(s):</b>	403100-403119

Current Fee Amount	Incremental Increase Request	Requested Fee Amount	Requested % Increase
\$ 107	\$ -	\$ 107	0%

Current Budgeted Revenue	Projected Fee Instances	Projected Incremental Revenue Increase at Requested Level	Total Projected Revenue at Requested Level
\$ 6,130,000	50,363	\$ -	\$ 5,388,841

**What is the purpose/use of this fee?** *(You should be as detailed as possible. Attach additional documentation as necessary)*

The purpose of the Technology Fee is to fund refurbishment of existing technology-based education equipment and innovative projects for use in advancing technology in the 21st century.

**How will the incremental revenue be used?** *(You should be as detailed as possible. Attach additional documentation as necessary)*

Directly benefiting students by improvements made to technology related to academemic outcomes and instructional objectives.

### Section II

**Financial Data:** Please complete the Financial Data Sheets and the Detail of Revenue Sheets for this Fee. The financial data must be completed even if no fee increase is being requested. (Total Revenues and Total Expenditures will update automatically when Financial Data sheet is completed)

As of June 30, 2014	Total Revenues	Total Expenditures	% of Revenue Expended
	\$ 5,328,931.00	\$ 3,733,443.00	70%

**Provide explanation if % of revenue expended is less than 80%**

The remaining funds were encumbered (\$1,109,433) at year end and \$486,055 was carried forward from FY14 to FY15 and was spent in first quarter of FY15 leaving a \$0.00 balance.

**Available Fund Balance Information as of June 30, 2014**

\$ 1,595,488.00	Fund Balance per General Ledger
\$ 1,109,433.00	Encumbered funds as of June 30, 2014
\$ -	Reserved for Renewals and Replacements as of June 30, 2014
\$ 486,055.00	Available Fund Balance as of June 30, 2014

**Provide explanations for planned uses of available Fund Balance:**

\$486,055 was carried forward from FY14 to FY15 and was spent in first quarter of FY15 leaving a \$0.00 fund balance. Carry-forward funds-\$194,658 for hardware, materials and supplies to improve the outdoor wireless network and \$291,397 for wireless improvements and technology refreshment in Clough Commons.

# Mandatory Fee Request Form

Fiscal Year 2016

Institution Name: Georgia Institute of Technology

## Section III

### Questions and Answers:

(1) Is this fee required for all students regardless of the number of credit hours taken, method of delivery (i.e. distance learning), etc. ? If no, please explain. Yes

(2) What positions, if any, are being funded through this fee? Please list the positions.

(3) Is this fee being used to cover employee travel? If yes, please explain. No

(4) Are significant changes to the fee amount anticipated within the next three (3) years? If yes, please list. No

(5) Does this fee support any type of debt service? If yes, please explain in detail. No

(6) Other than the student fee committee, what percentage of the student body was made aware of the fee? How was the student body at large informed and/or engaged in the process (i.e. town hall meetings, online surveys, etc). Please explain and/or attach appropriate documentation. Were these actions taken before or after the student committee vote?

This fee was discussed among the members of the Technology Fee Committee as well as the Mandatory Fee Committee. Information was posted on the Office of Institute Budget Planning & Administration website.

(7) Please list all reports/documents that were provided to the student fee committee prior to the committee vote (i.e. detailed budget reports, prior year revenue, expenditures and reserves, presentations, etc.)?

This fee was not put before the Mandatory Fee Committee for a vote, it was determined that a request would not be made for a fee increase in FY16.

**Mandatory Fee**

Fiscal Year 2016

**Financial Data**

**Technology Fee**

(Insert Fee Name)

Institution: Georgia Institute of Technology

	A	B	C	D	E	F
					= (F - D)	
					Revenue	FY 2016
					Generated by	Proposed
	FY 2013	FY 2014	FY 2015	FY 2016	Rate	Budget
	Actual	Actual	Current	Projected	Increase	w/ Fee Increase
			Budget	Budget		
				w/o Fee Increase		
<b>Revenue</b>						
<b>Fee Revenue</b>	\$ 5,284,014	\$ 5,328,931	\$ 5,643,945	5,388,841	-	5,388,841
Planned Reserve Amount to be Used (NEW)	\$ 16,923		\$ 486,055			
Non-Fee Revenue (list Individually)						
<b>Total Revenue</b>	<b>\$ 5,300,937</b>	<b>\$ 5,328,931</b>	<b>\$ 6,130,000</b>	<b>\$ 5,388,841</b>	<b>\$ -</b>	<b>\$ 5,388,841</b>
Cost of Goods Sold						
<b>Net Revenue</b>	<b>\$ 5,300,937</b>	<b>\$ 5,328,931</b>	<b>\$ 6,130,000</b>	<b>\$ 5,388,841</b>	<b>\$ -</b>	<b>\$ 5,388,841</b>
<b>Expenditures</b>						
Personal Services (Including Fringes) - Staff						
Personal Services (Including Fringes) - Students						
Travel						
Supplies and Materials	\$ 1,272,406	\$ 1,400,834	\$ 5,670,000	\$ 4,928,841		\$ 4,928,841
Repairs and Maintenance	\$ 15,201	\$ 10,682				
Telecommunications						
Contracted Services	\$ 140,951	\$ 190,977				
Lease Payments (Debt Service)						
Software	\$ 557,288	\$ 441,638				
Equipment Non-capitalized	\$ 172,576	\$ 247,739				
Equipment Capitalized	\$ 800,537	\$ 712,353				
Scholarships						
Stipends						
Auxiliary Services Administration						
Plant Allocation						
Other Expenses, (list Individually):						
OIT- Printing and Copying Services	\$ 484,446	\$ 437,785	\$ 460,000	\$ 460,000	-	\$ 460,000
Computer Internet Charges		\$ 19,006				
Subscription and Dues	\$ 294,644	\$ 272,429				
<b>Total Expenditures</b>	<b>\$ 3,738,049</b>	<b>\$ 3,733,443</b>	<b>\$ 6,130,000</b>	<b>\$ 5,388,841</b>	<b>\$ -</b>	<b>\$ 5,388,841</b>
<b>Surplus (Deficit)</b>	<b>\$ 1,562,888</b>	<b>\$ 1,595,488</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>Cumulative Fund Balance</b>	<b>\$ -</b>	<b>\$ 486,055</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>	<b>\$ -</b>
<b>% of Revenue Expended</b>	<b>70.52%</b>	<b>70.06%</b>	<b>100.00%</b>	<b>100.00%</b>	<b>#DIV/0!</b>	<b>100.00%</b>

**NOTES:**

- (A, B) The actual data for FY 2013 and FY2014 should agree to the general ledger as included in the respective Annual Financial Reports.
- (C) FY 2015 Current Budget represents the currently approved amendment.
- (D) FY 2016 Projected Budget w/o fee increase should represent the projected budget without any consideration of a fee increase. The budget will consist of enrollment increases.
- (E) Rate Increase will represent only the increase in revenue and expenditures related to the proposed rate increase.
- (F) FY 2016 Proposed Budget will be the sum of FY 2016 Projected Budget w/o Fee Increase plus Rate Increase.

## Mandatory Fee

Fiscal Year 2016

### Financial Data

Detail of Revenue Projection

(Insert Fee Name)

Institution: \_\_\_\_\_

			A	B	C	D = A x C	E	F = C x E
Fee Detail	FY 2013 Actual Rate	FY 2014 Actual Rate	FY 2015 Current Rate	FY 2015 Number of Participants	FY 2016 Number of Participants	Projected FY 2016 Revenue with Current Rate	FY 2015 Proposed Rate	Projected FY 2016 Revenue with Proposed Rate
Fall/Spring								
0 - 4 credit hours	107	107	107	2,613	2,639	\$ 282,373	107	\$ 282,373
5 - 8 credit hours	107	107	107	2,077	2,097	\$ 224,379	107	\$ 224,379
9 - 12 credit hours	107	107	107	8,239	8,321	\$ 890,347	107	\$ 890,347
Full-time	107	107	107	28,531	28,559	\$ 3,055,813	107	\$ 3,055,813
<b>Total</b>				<b>41,460</b>	<b>41,616</b>			
Summer								
0 - 4 credit hours	107	107	107	1,170	1,181	\$ 126,367	107	\$ 126,367
5 - 8 credit hours	107	107	107	2,628	2,654	\$ 283,978	107	\$ 283,978
9 - 12 credit hours	107	107	107	2,412	2,436	\$ 260,652	107	\$ 260,652
Full-time	107	107	107	2,451	2,476	\$ 264,932	107	\$ 264,932
<b>Total</b>				<b>8,661</b>	<b>8,747</b>			
<b>TOTAL</b>				<b>50,363</b>	<b>50,363</b>	<b>\$ 5,388,841</b>		<b>\$ 5,388,841</b>

**NOTES:**

- (1) Under different Auxiliary Units there may be several fee types. If your institution has various fees under any one unit list out each fee individually with the applicable description.
- (2) If you have a different fee level for different types of participants, please list each category separate (i.e. if you charge a lesser fee for students in less than full time credit hour categories).

Year	2014
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Sum of ACTUALS				
Category	PS/NPS	Acct3	Descr2	Total
REV	REV	403	GTSav Technology Fee - Smr B	(86)
			Technology Fees - Fall	(2,260,637)
			Technology Fees - Smr A	(553,297)
			Technology Fees - Smr B	(365,490)
			Technology Fees - Spring	(2,082,322)
			OMSCS Tech Fee - Smr A	(30,675)
			OMSCS Tech Fee - Spring	(36,424)
		<b>403 Total</b>		<b>(5,328,931)</b>
		<b>REV Total</b>		<b>(5,328,931)</b>
REV Total				(5,328,931)
EXP	Op Exp	714	Supplies & Materials (Fclts)	249
			Supplies And Materials	1,127,284
			Tech Purchases < \$3,000	154,198
		<b>714 Total</b>		<b>1,281,731</b>
		715	Repair & Maint-Comp/Equip(IRS)	4,543
			Repairs & Maint (Facilities)	3,230
			Repairs & Maintenance (IRS)	408
			Repairs And Maintenance	2,500
		<b>715 Total</b>		<b>10,682</b>
		727	Freight, Express & Stor (IRS)	248
			Misc Other Operating Expense	118,855
			Subscriptions And Dues	272,429
		<b>727 Total</b>		<b>391,533</b>
		733	Software	441,638
		<b>733 Total</b>		<b>441,638</b>
		742	OIT Print/Copy Svcs (PCS)(IRS)	437,785
		<b>742 Total</b>		<b>437,785</b>
		743	Equip-Purch-Inv 3,000-4,999	233,091
			Equip-Purch <5k Spon Ret Title	-
		<b>743 Total</b>		<b>233,091</b>
		744	Equip-IT Inventory 3,000-4,999	14,648
		<b>744 Total</b>		<b>14,648</b>
		751	Services - IT Consultant (IRS)	8,901
			Services-Misc,Temp Agency(IRS)	2,864
		<b>751 Total</b>		<b>11,765</b>
		753	Contracts-Maint Comp Sftw(IRS)	169,972
			Contracts-Other (IRS)	9,240
		<b>753 Total</b>		<b>179,212</b>
		760	Computer Chrgs-Internet Svcs	19,006
		<b>760 Total</b>		<b>19,006</b>
		<b>Op Exp Total</b>		<b>3,021,090</b>
	Equip	843	Cmp W/Title Ret by GT (>\$4999)	84,546
			Eq W/Title Ret by GT (>\$4,999)	534,964
			IT Eq Oth Than Comp >\$4,999	82,643
		<b>843 Total</b>		<b>702,153</b>
		870	Facilities and Other Improve	-
		<b>870 Total</b>		<b>-</b>
		860	Work In Process - Construction	10,200
		<b>860 Total</b>		<b>10,200</b>
		<b>Equip Total</b>		<b>712,353</b>
EXP Total				3,733,444
Grand Total				(1,595,487)

		Data	
Category	Year	Sum of ENCUMB	Sum of ACTUALS
EXP	2014	1,109,433	3,733,444
EXP Total		1,109,433	3,733,444
REV	2014	-	(5,328,931)
REV Total		-	(5,328,931)
Grand Total		1,109,433	(1,595,487)

**To tie to Tech Fee Mandatory Fee Financial Data Form:**

Supplies & Materials	1,400,834
Repairs & Maint	10,682
Contracted Svcs	190,977
Software	441,638
Equip-Non Cap	247,739
Equip-Cap	712,353 (all 8%)
OIT PCS	437,785
Subscriptions & Dues	272,429
	<hr/>
	3,714,438
Computer Charge Internet	(19,006)
	19,006
Variance	-

Year	2013
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Sum of ACTUALS				
Category	PS/NPS	Acct3	Descr2	Total
REV	REV	403	GTSav Technology Fee - Fall	(6,848)
			GTSav Technology Fee - Smr A	(128)
			GTSav Technology Fee - Smr B	(2,440)
			GTSav Technology Fee - Spring	(4,173)
			PY Technology Fees	66
			Technology Fees - Fall	(2,261,283)
			Technology Fees - Smr A	(549,184)
			Technology Fees - Smr B	(371,435)
			Technology Fees - Spring	(2,088,589)
		<b>403 Total</b>		<b>(5,284,014)</b>
		<b>REV Total</b>		<b>(5,284,014)</b>
REV Total				(5,284,014)
EXP	Op Exp	714	Supplies & Materials (Fcfts)	482
			Supplies And Materials	591,002
			Tech Purchases < \$3,000	596,792
		<b>714 Total</b>		<b>1,188,276</b>
		715	Repair & Maint-Comp/Equip(IRS)	8,624
			Repairs & Maint (Facilities)	1,325
			Repairs & Maintenance (IRS)	5,252
		<b>715 Total</b>		<b>15,200</b>
		727	Freight, Express & Stor (IRS)	1,262
			Misc Other Operating Expense	82,868
			Subscriptions And Dues	294,644
		<b>727 Total</b>		<b>378,775</b>
		733	Software	557,288
		<b>733 Total</b>		<b>557,288</b>
		742	OIT Print/Copy Svcs (PCS)(IRS)	484,446
		<b>742 Total</b>		<b>484,446</b>
		743	Equip-Purch-Inv 3,000-4,999	125,785
		<b>743 Total</b>		<b>125,785</b>
		744	Equip-IT Inventory 3,000-4,999	46,791
		<b>744 Total</b>		<b>46,791</b>
		751	Services - IT Consultant (IRS)	8,425
			Services-Misc,Temp Agency(IRS)	2,310
		<b>751 Total</b>		<b>10,735</b>
		753	Contracts-Maint Comp Sftw(IRS)	122,128
			Contracts-Other (IRS)	8,088
		<b>753 Total</b>		<b>130,217</b>
		<b>Op Exp Total</b>		<b>2,937,512</b>
	Equip	818	Equip Lease/Purchase Computer	6,939
		<b>818 Total</b>		<b>6,939</b>
		842	Affiliate Equipment	80,333
			EMTECH Scientific Equipment	-
		<b>842 Total</b>		<b>80,333</b>
		843	Cmp W/Title Ret by GT (>\$4999)	20,518
			Eq W/Title Ret by GT (>\$4,999)	669,570
			IT Eq Oth Than Comp >\$4,999	23,178
		<b>843 Total</b>		<b>713,266</b>
		<b>Equip Total</b>		<b>800,537</b>
EXP Total				3,738,049
Grand Total				(1,545,964)

Data		
Category	Sum of ENCUMB	Sum of ACTUALS
EXP	1,562,887	3,738,049
REV	-	(5,284,014)
Grand Total	1,562,887	(1,545,964)

**To tie to Tech Fee Mandatory Fee Financial Data Form:**

Supplies & Materials	1,272,406
Repairs & Maint	15,200
Contracted Svcs	140,951
Software	557,288
Equip-Non Cap	172,577
Equip-Cap	800,537 (all 8%)
OIT PCS	484,446
Subscriptions & Dues	294,644
	<u>3,738,049</u>
variance to pivot	-

**GEORGIA INSTITUTE OF TECHNOLOGY**  
**MANDATORY FEES REQUESTED FOR FISCAL YEAR 2016**

<b>Mandatory Fee:</b>	Technology
<b>Current Fee Level FY15:</b>	\$107 per semester
<b>Proposed Fee Level FY16:</b>	
<b>FY 2014 Revenue:</b>	\$5,328,931
<b>Fee Review Organization:</b>	Technology Fee Committee

**Current Uses of Revenue:**

The Technology Fee was implemented at Georgia Tech in fiscal year 1997. Tech was one of only four institutions in the university system to be granted approval for the fee at that time. The fee was initiated to help meet the ever-increasing demand and need for technological funding, as it became evident that traditional sources of funding could not keep pace with the need for technology expenditures. All units of the University System now have a technology fee in place.

The Technology Fee is used:

"to fund refurbishment of existing technology-based education equipment and innovative projects for the use of technology in education in the 21st century. Funds for refurbishment of technology should be made available on a broad, equitable basis to ensure modern technology for all students. Simultaneously, funds to develop new applications of new technologies enhancing education in the future should be funded through a competitive proposal process." (Technology Fee Policy)

***Explanation of Fiscal 2016 Fee Request:***

***Consequences If Request is Not Approved:***