

FY 2018 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). If yes is selected, please fill out the Project code(s) and Project name(s).
4. Please select "new" or "existing" for fee.
5. Include the department code(s), 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 FY2017. This amount should match Lettered Column D 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% or greater than 100%
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.
3. The revamped Move On When Ready (MOWR) program provides \$50 per MOWR student per semester. Institutions may choose which fee/fund to record the MOWR revenue. For example institution A may include revenue in fund 12280 (Athletics) and institution B may include revenue in fund 13000 (Student Activities). Use the dual enrollment category to report as appropriate.

Completed forms are due to the System Office on December 16, 2016. The forms should be sent to the Budget Office at budget.office@usg.edu with a copy to your assigned budget analyst.

Mandatory Fee Request Form
Fiscal Year 2018

Institution Name: Georgia Institute of Technology
 Preparer/Contact Information: Isabel Lynch isabel.lynych@business.gatech.edu 404.894.5557

Section I

Name of Fee:	Student Activity Fee	PPV Fee?	No
Type of Fee:	Activity	If PPV, Project code(s) & Project name(s):	No
New fee or existing fee?	Existing	Department Code(s):	
Fund Code:	13095	Revenue Account Code(s):	408100, 408102, 408103, 408104, 408522, 408523, 408526, 408527

Current Fee Amount	Incremental Increase Request	Requested Fee Amount	Requested % Increase
\$ 123	\$ -	\$ 123	0%
Current Budgeted Fee Revenue	Projected Fee Instances	Projected Incremental Revenue Increase at Requested Level	Total Projected Revenue at Requested Level
\$ 4,973,296	47,579	\$ -	\$ 5,462,366

What is the purpose/use of this fee? Has the purpose of the fee changes since last fiscal year? (You should be as detailed as possible. Attach additional documentation as necessary)

The Student Activity Fee is administered by the Student Government Association. The fee funds various student organizations benefiting students such as the Campus Recreation Center operations, Student Center, Student Publications, WREK Radio, DramaTech, Student Organizations Finance Office, and sports clubs, cultural clubs and special interest groups. Funding includes personal service expenses, travel and operating supplies and equipment.

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

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, 2016	Total Revenues	Total Expenditures	% of Revenue Expended
	\$ 5,204,085.00	\$ 4,887,742.80	94%

Provide explanation if % of revenue expended is less than 80% OR greater than 100%

Available Fund Balance Information as of June 30, 2016

\$ 2,065,996.61	Fund Balance per General Ledger
\$ 152,935.00	Encumbered funds as of June 30, 2016
\$ 1,035,170.00	Reserved for Renewals and Replacements as of June 30, 2016
\$ 877,891.61	Available Fund Balance as of June 30, 2016 (Negative amount represents a deficit)

Provide explanations for planned uses of available Fund Balance or, if deficit, provide planned actions for reducing deficit:

Available fund balance is allocated by SGA to student organizations during the fiscal year. Student Organizations submit requests for funding (bills) to SGA that go through a vote process. Funding can be requested for special events, speakers, student travel to national organization conferences, sports clubs tournaments, supplies, campus events, etc.

Mandatory Fee Request Form
Fiscal Year 2018

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), military status, etc.? **If no, list the exceptions and explain below.**
Students taking 4 hours or less are not required to pay this fee

(2) Do the projected fee instances reflect the number of exemptions/waivers that have been granted? **If no, explain below.** No
Move On when Ready (MOWR) is a new program (FY16) with very few participants that are granted waivers to the fee

(2a) Please provide the following details on exemptions/waivers:

	FY 2015	FY 2016	FY 2017	Projected FY 2018
# of Exemptions/Waivers	-	892.00	461.00	925.00
Amount	-	108,402	56,211	113,775

(3) Is this fee being used to cover employee travel? **If yes, explain below.** Yes
Yes. This fee is used supports the Graduate and Undergraduate Conference Fund - which provides a supplement to students, student assistant, GRA's, etc., to present or attend conferences in their fields of study. Students request funding and this goes through an approval process.

4) What positions, if any, are being funded through this fee? Please list the positions.
There are several positions funded by this fee. Please see attached. This fee also funds many student assistants.

(5) Are significant changes to the fee amount anticipated within the next three (3) years? **If yes, explain below.** No

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

(7) 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?

As a mandatory fee, all students are aware of this fee. No increase is requested for the Student Activity Fee. It was discussed within SGA (Graduate and Undergraduate) and due to their analysis this fee would remain at the current level. All students were informed and SGA officers are elected by the student body to represent them.

(8) Please **list and submit** 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.) **along with meeting minutes.**

(9) Only fill out this section if an increase is being requested.

In his letter regarding student fees, dated 9/26/16, the Chancellor stated that fee increase requests will only be considered if:
 (1) the fee supports a PPV at risk of falling into deficit, or
 (2) represents a prior commitment to a multi-year fee plan, or
 (3) reallocation of existing fees, on a case by case basis.
 Which of these scenarios is applicable for this increase? Why is a fee increase critical to the success of the activities described in this template? What would be the effects of the fee remaining flat?
 The narrative should reference the auxiliary 5-year business plans whenever possible for justification.

Mandatory Fee
Fiscal Year 2018

Financial Data
Student Activity Fee

(Insert Fee Name)

Institution: Georgia Institute of Technology

	Actuals Ledger			D True projections of revenues and expenditures	E From the Detail of Revenue Projection FY 2018 Planned Budget w/o Fee Increase	F From the Detail of Revenue Projection = (F - D) Revenue Generated by Rate Increase	G From the Detail of Revenue Projection FY 2018 Proposed Budget w/ Fee Increase
	FY 2014	FY 2015	FY 2016				
	Actual	Actual	Actual				
	Current Projections						
Revenue							
Mandatory Fee Revenue (Less: Allowances, Waivers, Etc.)	5,022,020	\$5,096,513	\$5,197,290	\$4,973,296	\$5,462,366	\$0	\$5,462,366
Non-Mandatory Student Fees (List out):							0
Clinic & Pharmacy							
Psychiatry Clinic							
Dental Space Lease							
Interest Income	19,738	11,519	6,471				0
Sales & Services							
Fines							0
Housing Rental Income							0
Other Rental Income							0
Meal Plan Sales							0
Other Food Service Sales							0
Athletic Ticket Sales							0
Game Guarantees							0
Athletic Camps							0
Other Athletic Revenue							0
Health Services							0
Non-Student Parking & Transportation							0
Advertising Revenue							0
Commissions							0
Bookstore & Gift shop Sales							0
Other Sales & Services							0
Miscellaneous Revenues							
Gifts							0
Other Miscellaneous Revenues (List out):							0
Student Org rev	1,391	18,908	324				0
Total Revenue	\$ 5,043,149	\$ 5,126,940	\$ 5,204,085	\$ 4,973,296	\$ 5,462,366	\$ -	\$ 5,462,366
Expenditures							
Personal Services							
Salaries - Faculty/Staff	1,425,908	1,457,848	1,538,527	1,670,473	1,770,473		1,770,473
Salaries - Students	1,103,230	1,170,208	1,207,329	1,271,113	1,321,113		1,321,113
Fringe Benefits	400,640	427,439	454,268	489,042	489,042		489,042
Plant Allocations							0
Travel							
Travel - Employee	98,199	89,985	82,415	186,989	186,989		186,989
Travel - Non-Employee	51,717	56,908	68,183				0
Operating Supplies and Expenses							
Purchases for Resale/Cost of Goods Sold							0
Supplies & Materials	502,570	492,161	635,659	1,687,870	1,694,749		1,694,749
Repairs and Maintenance	44,932	73,845	84,932				0
Utilities							0
Rental Payments (Non-Real Estate)	160,370	149,616	129,619				0
Insurance							0
Software	20,541	516	1,575				0
Equipment (Small Value)	49,551		16,596				0
Real Estate/Authority Lease Rental							0
Per Diems & Fees							0
Contracted Services	238,889	387,757	204,197				0
Telecommunications	42,262	42,373	42,024				0
Scholarships							0
Other Operating Expenses	473,831	386,776	363,769				0
Plant Allocations							0
Equipment/Capital Outlay							
Lease/Purchase - Principal							0
Lease/Purchase - Interest							0
R&R Reserve Contribution							0
Motor Vehicle Purchase		15,010	8,270				0
Equipment Purchase			21,783				0
Building and Facilities Renovation & Improvement			28,597				0
Total Expenditures	\$ 4,612,640	\$ 4,750,443	\$ 4,887,743	\$ 5,305,487	\$ 5,462,366	\$ -	\$ 5,462,366
Encumbrances	\$ 158,994	\$ 75,322	\$ 152,935	\$ -	\$ -	\$ -	\$ -
Depreciation	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Surplus (Deficit)	\$ 589,503	\$ 451,819	\$ 469,277	\$ (332,191)	\$ -	\$ -	\$ -
Cumulative Fund Balance	\$ 1,559,243	\$ 1,632,318	\$ 2,101,195	\$ 1,769,004	\$ 1,769,004		\$ 1,769,004
% of Revenue Expended	91.46%	92.66%	93.92%	106.68%	100.00%	#DIV/0!	100.00%

NOTES:
 - (A, B, C) The actual data for FY 2014, FY 2015 and FY2016 should agree to the general ledger as included in the respective **PS Actuals Ledger**.
 - (D) FY 2017 Current projection should reflect the best estimate of actual revenues and expenditures. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
 - (E) FY 2018 Projected Budget w/o fee increase should represent the projected budget without any consideration of a fee increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
 - (F) Rate Increase will represent only the increase in revenue and expenditures related to the proposed rate increase.
 - (G) FY 2018 Proposed Budget will be the sum of FY 2018 Projected Budget w/o Fee Increase plus Rate Increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**

Mandatory Fee

Fiscal Year 2018

Financial Data

Detail of Revenue Projection

(Insert Fee Name)

Institution: _____

Fee Detail	A			B		C		D = A x C		E		F = C x E	
	FY 2015 Actual Rate	FY 2016 Actual Rate	FY 2017 Current Rate	FY 2017 Number of Participants	FY 2018 Number of Participants	Projected FY 2018 Revenue with Current Rate		FY 2018 Proposed Rate		Projected FY 2018 Revenue with Proposed Rate			
Fall Semester													
Dual Enrolled						\$	-			\$	-		
0-4 credit hours	123	123	123	523	523	\$	64,329	123	\$	64,329			
5-8 credit hours	123	123	123	921	921	\$	113,283	123	\$	113,283			
9-12 credit hours	123	123	123	4,966	4,966	\$	610,818	123	\$	610,818			
Full-time	123	123	123	15,068	15,068	\$	1,853,364	123	\$	1,853,364			
Fall Semester Total				21,478	21,478		2,641,794			2,641,794			
Spring Semester													
Dual Enrolled						\$	-			\$	-		
0-4 credit hours	123	123	123	496	496	\$	61,008	123	\$	61,008			
5-8 credit hours	123	123	123	900	900	\$	110,700	123	\$	110,700			
9-12 credit hours	123	123	123	4,297	4,297	\$	528,531	123	\$	528,531			
Full-time	123	123	123	14,017	14,017	\$	1,724,091	123	\$	1,724,091			
Spring Semester Total				19,710	19,710		2,424,330			2,424,330			
Summer Semester													
Dual Enrolled						\$	-			\$	-		
0-4 credit hours	62	62	62	134	134	\$	8,308	62	\$	8,308			
5-8 credit hours	62	62	62	2,466	2,466	\$	152,892	62	\$	152,892			
9-12 credit hours	62	62	62	1,523	1,523	\$	94,426	62	\$	94,426			
Full-time	62	62	62	2,268	2,268	\$	140,616	62	\$	140,616			
Summer Semester Total				6,391	6,391		396,242			396,242			
Fiscal Year Total				47,579	47,579		5,462,366			5,462,366			

NOTES:

(1) If you have a different fee level for different types of participants, please list each category separately (i.e. if you charge a lesser fee for students in less than full time credit hour categories).

Mandatory Fee

Fiscal Year 2018

Financial Data

Student Activity Fee

(Insert Fee Name)

FY2016 - POSITIONS PARTIALLY OR FULLY FUNDED BY STUDENT ACTIVITY FEE

- Admin Professional II
- Admin Professional II
- Admin Professional III
- Admin Professional Sr
- Admin Professional Sr
- Aquatic Coordinator
- Assc Dir-Student Ctr Ops & Fac
- Assc Dir-Student Ctr Programs
- Asst Dir-CRC
- Asst Dir-CRC
- Asst Dir-CRC
- Communications Officer I
- Communications Officer I
- Communications Officer I
- Comp Sports Coord-Ops
- Custodial Supv II
- Dir-Student Center
- Dir-Student Center
- Event Coordinator I
- Facilities Mgr II
- Financial Admin I
- Financial Admin I
- Information Desk Coord
- IT Support Prof Sr
- Outdoor Recreation Coord
- Staging Specialist I
- Staging Specialist I
- Staging Specialist II
- Student Center Ops Mgr
- Student Center Program Adv Sr
- Student Ctr Program Adv
- Student Ctr Program Adv
- Student Assistants
- Graduate Assistants
- Fringe Benefits

Mandatory Fee

Fiscal Year 2018

Financial Data

Student Activity Fee

(Insert Fee Name)

Institution: _____

Georgia Institute of Technology

Financial Data Roll Up

	A	B	C	D	E	F	G
	Actuals Ledger			True projections of revenues and expenditures	From the Detail of Revenue Projection	From the Detail of Revenue Projection = (F - D) Revenue Generated by Rate Increase	From the Detail of Revenue Projection
	FY 2014	FY 2015	FY 2016	FY 2017	Planned	Budget	Proposed
	Actual	Actual	Actual	Current	Budget	Rate	Budget
				Projections	w/o Fee Increase		w/ Fee Increase
Revenue							
Mandatory Fee Revenue (Less: Allowances, Waivers, Etc.)	5,022,020	\$5,096,513	\$5,197,290	\$4,973,296	\$5,462,366	\$0	\$5,462,366
Non-Mandatory Student Fees (List out):	19,738	11,519	6,471	0	0	0	0
<i>Sales & Services</i>							
<i>Miscellaneous Revenues</i>	1,391	18,908	324	0	0	0	0
Total Revenue	\$ 5,043,149	\$ 5,126,940	\$ 5,204,085	\$ 4,973,296	\$ 5,462,366	\$ -	\$ 5,462,366
Expenditures							
<i>Personal Services</i>	2,929,777	3,055,495	3,200,125	3,430,628	3,580,628		3,580,628
<i>Travel</i>	149,916	146,893	150,597	186,989	186,989		186,989
<i>Operating Supplies and Expenses</i>	1,532,946	1,533,045	1,478,370	1,687,870	1,694,749		1,694,749
<i>Equipment/Capital Outlay</i>	0	15,010	58,651	0	0		0
Total Expenditures	\$ 4,612,640	\$ 4,750,443	\$ 4,887,743	\$ 5,305,487	\$ 5,462,366	\$ -	\$ 5,462,366
Encumbrances	\$ 158,994	\$ 75,322	\$ 152,935	\$ -	\$ -	\$ -	\$ -
Depreciation	-	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Surplus (Deficit)	\$ 589,503	\$ 451,819	\$ 469,277	\$ (332,191)	\$ -	\$ -	\$ -
Cumulative Fund Balance	\$ 1,559,243	\$ 1,632,318	\$ 2,101,195	\$ 1,769,004	\$ 1,769,004		\$ 1,769,004
% of Revenue Expended	91.46%	92.66%	93.92%	106.68%	100.00%	#DIV/0!	100.00%

NOTES:

- (A, B, C) The actual data for FY 2014, FY 2015 and FY2016 should agree to the general ledger as included in the respective **PS Actuals Ledger**.
- (D) FY 2017 Current projection should reflect the best estimate of actual revenues and expenditures. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
- (E) FY 2018 Projected Budget w/o fee increase should represent the projected budget without any consideration of a fee increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
- (F) Rate Increase will represent only the increase in revenue and expenditures related to the proposed rate increase.
- (G) FY 2018 Proposed Budget will be the sum of FY 2018 Projected Budget w/o Fee Increase plus Rate Increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**

Mandatory Fee

Fiscal Year 2018

Financial Data

Student Activity Fee

(Insert Fee Name)

Institution: Georgia Institute of Technology
Line Item % of Total

	Actuals Ledger			True projections of revenues and expenditures	From the Detail of Revenue Projection		From the Detail of Revenue Projection = (F - D) Revenue Generated by Rate Increase	From the Detail of Revenue Projection FY 2018 Proposed Budget w/ Fee Increase
	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual		FY 2017 Current Projections	FY 2018 Planned Budget w/o Fee Increase		
Revenue								
<i>Mandatory Fee Revenue (Less: Allowances, Waivers, Etc.)</i>	99.6%	99.4%	99.9%	100.0%	100.0%			100.0%
<i>Non-Mandatory Student Fees (List out):</i>	0.4%	0.2%	0.1%	0.0%	0.0%			0.0%
<i>Sales & Services</i>	0.0%	0.0%	0.0%	0.0%	0.0%			0.0%
<i>Miscellaneous Revenues</i>	0.0%	0.4%	0.0%	0.0%	0.0%			0.0%
Total Revenue	100%	100%	100%	100%	100%			100%
Expenditures								
<i>Personal Services</i>	64%	64%	65%	65%	66%			66%
<i>Travel</i>	3%	3%	3%	4%	3%			3%
<i>Operating Supplies and Expenses</i>	33%	32%	30%	32%	31%			31%
<i>Equipment/Capital Outlay</i>	0%	0%	1%	0%	0%			0%
Total Expenditures	100%	100%	100%	100%	100%			100%

NOTES:

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- (D) FY 2017 Current projection should reflect the best estimate of actual revenues and expenditures. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
- (E) FY 2018 Projected Budget w/o fee increase should represent the projected budget without any consideration of a fee increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
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Mandatory Fee

Fiscal Year 2018

Financial Data

Student Activity Fee

(Insert Fee Name)

Institution: Georgia Institute of Technology

Yearly % Change

	A	B	C	D	E	F	G
	Actuals Ledger			True projections of revenues and expenditures	From the Detail of Revenue Projection	From the Detail of Revenue Projection = (F - D) Revenue Generated by Rate Increase	From the Detail of Revenue Projection
					FY 2018 Planned Budget w/o Fee Increase		FY 2018 Proposed Budget w/ Fee Increase
	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Current Projections			
Revenue							
<i>Mandatory Fee Revenue (Less: Allowances, Waivers, Etc.)</i>		1.5%	2.0%	-4.3%	9.8%		9.8%
<i>Non-Mandatory Student Fees (List out):</i>		-41.6%	-43.8%	-100.0%			0.0%
<i>Sales & Services</i>							0.0%
<i>Miscellaneous Revenues</i>		1259.3%	-98.3%	-100.0%			0.0%
Total Revenue		1.7%	1.5%	-4.4%	9.8%		100%
Expenditures							
<i>Personal Services</i>		4.3%	4.7%	7.2%	4.4%		4.4%
<i>Travel</i>		-2.0%	2.5%	24.2%	0.0%		0.0%
<i>Operating Supplies and Expenses</i>		0.0%	-3.6%	14.2%	0.4%		0.4%
<i>Equipment/Capital Outlay</i>				-100.0%			
Total Expenditures		3.0%	2.9%	8.5%	3.0%		3.0%

NOTES:

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- (D) FY 2017 Current projection should reflect the best estimate of actual revenues and expenditures. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
- (E) FY 2018 Projected Budget w/o fee increase should represent the projected budget without any consideration of a fee increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**
- (F) Rate Increase will represent only the increase in revenue and expenditures related to the proposed rate increase.
- (G) FY 2018 Proposed Budget will be the sum of FY 2018 Projected Budget w/o Fee Increase plus Rate Increase. **Revenues and expenditures do not have to balance. Show projected surplus/deficit.**