

## Kirk, James E

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**From:** Kirk, James E  
**Sent:** Monday, January 28, 2019 11:21 AM  
**To:** David A. Dickerson; 'budget.office@usg.edu'  
**Cc:** Lynch, Isabel C; Lisa Godfrey (lisa.godfrey@business.gatech.edu); Thompson, Ebony M  
**Subject:** FW: FY 2020 Mandatory Fee Requests  
**Attachments:** Mandatory Fee History FY15-FY20 Proposed Rv (1-25-2019).pdf; FY20 Combined Participation Forms (12-14-2018 and 1-28-2019 Submissions).pdf; FY 2020 Mandatory Fee Form -Health (Revised 1-24-2019) .xlsx; Budget20-Health Narrative MSFAC (Rv 1-24-2018).pdf; FY 2020 Mandatory Fee Form -Athletics(revised as of 1.24.19).xlsx; FY 2020 Mandatory Fee Form -Student activities .xlsx

David – Attached are the documents for our final three mandatory fee submissions. Per the e-mail below, we sent the documents for all of our other fees back on December 14<sup>th</sup>.

Our Mandatory Student Fee Advisory Committee met last week on our other three fees and provided the following recommendations to President Peterson:

Student Health – \$4 increase from \$168 to \$172 (2.4%)  
Athletics – no increase  
Student Activity – no increase.

The president has approved submission of these recommendations to the Board of Regents. The Student Health Fee increase is based on the need to improve mental health services to students. The narrative supporting this increase indicates the efforts made by the Institute to repurpose funds internally and to create efficiencies in order to minimize the requested fee increase. As shown in the attached spreadsheet summarizing our mandatory fees, the Health Fee has increased only 7.5% over five years, despite rising health costs. Votes for all fees by our Mandatory Student Fee Advisory Committee were unanimous.

### Attachments:

1. Five year mandatory fee history
2. Signed participation forms for all fees
3. Health Fee detail and request form
4. Health fee narrative justification
5. Athletics Fee detail and request form
6. Student Activity Fee detail and request form

Please let me know if you need additional information. All presentations from the departments are posted at this web site – <http://www.budgets.gatech.edu/mResources/MSFAC>. The Health Fee presentation is under “Meeting 4.”

JK

Jim Kirk  
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**From:** Kirk, James E  
**Sent:** Friday, December 14, 2018 3:41 PM  
**To:** [budget.office@usg.edu](mailto:budget.office@usg.edu)  
**Cc:** David A. Dickerson <[David.Dickerson@USG.EDU](mailto:David.Dickerson@USG.EDU)>; Lynch, Isabel C <[isabel.lynch@business.gatech.edu](mailto:isabel.lynch@business.gatech.edu)>  
**Subject:** FW: FY 2020 Mandatory Fee Requests

David – Attached are Georgia Tech’s submissions for all eight of our mandatory fees. In addition the participation forms and the fee templates, attached is a document containing narratives on all of the fees.

Here is the status of our recommendations, as I wrote to you and Jason earlier in the week:

For five of the fees – Student Center Operations, Campus Rec Center Operations, Campus Rec Center Debt Service (“recreation fee”), Transportation, and Technology – the students voted to recommend to the president zero increases. However, the students were not ready to vote on three of the fees, pending further information and discussion. We will submit the forms with zero increases for now, but President Peterson wants us to leave the door open for increase requests for two of these three:

- Athletics – no increase to be requested, but vote pending presentation by the athletics finance director
- Student Activities – student leaders considering the need for an small increase due to the great increase in the demand from student organizations for funding; fee not increased in a number of years
- Student Health – consideration of additional psychiatric services in light of recent campus incidents.

Please note that President Peterson and Jim Fortner asked us to be prepared to propose in January a \$5 increase in the Student Health Fee to bolster mental health services. This will be discussed at the next Mandatory Student Fee Advisory Committee meeting, to be held the middle of January. We have already prepared a spreadsheet containing the \$5 increase, but the attached shows a zero increase. As noted, the students also want to consider an increase in the Student Activities Fee. The participation forms for these the three fees not yet voted on are omitted.

Please let Isabel Lynch (404-894-5557) or me know if there are questions.

Thanks,  
JK

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**From:** Fiscal Office Contacts-USoG [mailto:[BUDGET-L@LISTSERV.UGA.EDU](mailto:BUDGET-L@LISTSERV.UGA.EDU)] **On Behalf Of** Jason A. Matt  
**Sent:** Friday, October 12, 2018 7:00 PM  
**To:** [BUDGET-L@LISTSERV.UGA.EDU](mailto:BUDGET-L@LISTSERV.UGA.EDU)  
**Subject:** FY 2020 Mandatory Fee Requests

Hello all,

The FY 2020 Mandatory Fee forms are due to the System Office on Friday, December 14<sup>th</sup>. Two templates are attached to this email. Both must be submitted for each mandatory fee, including those requested at a flat rate.

- FY 2020 Mandatory Fee Request Workbook
- FY 2020 Mandatory Fee Student Participation Form

Note: there is not a Summary form this year. The USG Budget Office will complete the summary form from your individual submissions.

Please also read the Chancellor’s letter to Presidents attached to this email. I echo his words...a lot of hard work has been done on your parts to keep fee increases to a minimum over the last several years. This is to be commended.

The following principles are to guide your FY 2020 fee requests:

1. New fee requests or increases to existing fees will not be recommended to the Board unless the institution presents a detailed business case, including analysis of available reserves.
2. New fees are strongly discouraged and should not be proposed unless there is overwhelming student support and a clear benefit to student success.
3. Fee increases needed to support PPV projects whose revenues are falling or expected to fall below levels to sustain those projects may be considered, however, before requesting an increase you should:
  - a. review all project costs and processes to identify where efficiencies can be realized and expenses reduced;
  - b. explore other sources of revenue, besides fee revenue, to compensate for any actual or anticipated revenue shortage;
  - c. determine the availability of reserves to sustain project; and
  - d. evaluate the project plan to determine whether revisions to the plan to meet the lower revenues levels or estimates are feasible.

\*\*Please work with Cynthia Alexander, Executive Finance Director, if you are considering increases to fees supporting PPV projects.
4. Consideration may be given to institutions to allow for the reallocation of fees, if the overall mandatory fee level remains neutral. Institutions must still demonstrate why an increased fee is critical, even if the increase is offset elsewhere.

We will hold a Q&A web conference on Friday, October 26<sup>th</sup> at 10am to talk through this annual data request and highlight the changes made to the template. Most of the updates are to streamline the form and not substantive content changes. This is an optional call that is primarily to provide time for your questions and input. There will not be any new information or announcements. Any new information will be shared to this listserv. However, we do want to put this on the calendar to allow time for group discussion and feedback. If you cannot make it, your budget analyst will be glad to discuss one-on-one. Details will be sent next week.

The completed forms should be sent to [budget.office@usg.edu](mailto:budget.office@usg.edu) with a copy to your assigned budget analyst on or before December 14, 2018. Please contact me or your budget analyst if you need assistance or have any questions.

Thank you,

Jason Matt  
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