**Fee Work Group II Report**

**November 14, 2014**

# Background

In May 2014, President Thomas J. Hynes charged a group of ten (10) individuals to review the processes and procedures surrounding the adoption and use of all fees that are charged to Clayton State University students. This Fee Work Group II (FWGII) should not be confused with an earlier fee group, which looked at Mandatory and Special Course Fees and developed a waiver plan in 2009.

The current FWGII was co-chaired by Corlis Cummings, Vice President for Business Operations and Elaine Manglitz, Vice President for Student Affairs.

We want to thank Dr. Hynes for giving us the opportunity to convene a diverse group of stakeholders to review Clayton State University’s student fees and the systems of accountability and communication regarding the use of those resources.

# Overview and Charge

The Fee Work Group II consisted of:

Ms. Carolina Amero AVP, Auxiliary & Administrative Services

Dr. John Campbell Associate Dean College of Arts & Sciences

Mr. Donal Christian AVP/Controller, Budget & Finance

Ms. Corlis Cummings Vice President, Business & Operations

Dr. Kevin Demmitt Interim Provost and Vice President, Academic Affairs

Mr. Timothy Duncan Athletics Director, Athletics

Mr. Bill Gruszka Interim VP of Information Technology and Services

Dr. Elaine Manglitz Vice President, Student Affairs

Mr. Scott McElroy Budget Director, Budget & Finance

Mr. Khalid Rajahn Student Fee Advisory Board

The Fee Work Group II’s charge:

*Review current systems of accountability and determine whether additional or different means are needed to communicate how the mandatory and course fees are used according to the purposes they were collected and allocated.*

*Reassess how best to communicate the purposes of the fees, the current processes for individuals/groups to make requests, and the transparency for the evaluation of the uses for fees relative to initial requests; in addition review how decisions are made within the mandatory fee areas, how to communicate to the campus community, whether changes are needed, and, if so, recommendations for those changes.*

*Re-evaluate the current structure of the fee committee – in order to involve the broader campus community, the work group might consider the use of multiple committees, tasked with review of specific mandatory fees, and how such a process could allow for a closer review of allocations or a consideration of alternative requests for allocations before said allocations are made.*

See Appendix 1.

# Research and Analysis

The FWGII analyzed the charge and divided it into three components: 1) review and evaluation of the organization, procedure and structure of the committee or board that oversees student fees; 2) review of all communications associated with each fee, committee or board; and 3) an accountability assessment. The FWGII was divided into 4 subgroups. Three of the subgroups looked at the above areas while the fourth conducted specialized research on Miscellaneous Fees.

The remainder of this report will summarize the research and analysis for each of the areas noted above. Recommendations for changes will be provided based on that research and analysis. Finally, relevant materials will be referenced and provided in the Appendices.

# Organizational Structure and Processes

One subgroup reviewed the organization, structure, and processes for student fee committees at Clayton State University. The subgroup reviewed Clayton State University’s and Board of Regents’ (BOR) requirements, researched organizational processes for Mandatory Fee Committees at other USG institutions, and interviewed all Mandatory Fee Holders regarding how fees are allocated and used. See Appendix 3. In addition, information from the research obtained by the Communication and Accountability subgroups was also used to ascertain the organizational structure and processes for the Course Fees and Miscellaneous Fees charged and used on campus.

1. **Student Fee Committees: Structure and Processes**
2. **Mandatory Fee Committee:**

The committee that reviews Mandatory Fees at Clayton State University is the Student Fees Advisory Board (SFAB). According to the BOR “proposals submitted by and institution to increase Mandatory Student Fees, proposals to create new Mandatory Student Fees, or a change in the purpose of a Mandatory Fee, shall first be presented for advice and counsel to a committee at each institution composed of at least fifty percent (50%) students. The committee shall include at least four students, who shall be appointed by the institution’s student government association. Institutions and student government associations should make a concerted effort to include broad representation among the students appointed to the committee” (7.3.2.1 BOR Policy).

A complete description of the Student Fees Advisory Board (SFAB) at Clayton State University, its organization and processes, can be found in Appendix 4. The committee is composed of sixteen individuals, eight students and eight faculty/staff and has been since 2006. Every effort is made to engage a broad representation of student participants on SFAB. This is partially accomplished by the SGA President soliciting students from the leadership of various student organizations on campus, including the Nontraditional Student Organization, SGA, the Student Veterans Association, Fraternity and Sorority Council, etc. in order to obtain broad based participation. The SFAB 1) reviews all budgets for allocation of Mandatory Student Fees and makes recommendations regarding support, modification, or non-support prior to submission to the BOR; 2) reviews all proposed changes in mandatory fees and makes recommendations regarding proposed changes prior to submission to the BOR; and 3) reviews all revenues and expenditures for each mandatory fee to ensure accountability processes are in place for all mandatory fees.

A subset of members of the SFAB (composed of at least 50% students) reviews all proposed budgets and recommends distribution/allocation of the portion of the student activity fees designated each academic year to registered student organizations, with recommendations made to the Vice President for Student Affairs. See the link below for details on how and for what purposes allocations are made and for the procedures taken to ensure accountability and proper usage of funds.

<https://www.clayton.edu/Portals/535/docs/StudentOrganizations/Fall14/Business_Policy_Manual_FY15_1.pdf>

In addition to SFAB recommendations for budget allocations to registered student organizations, during academic year 2013-14, a new “grant-like” process was piloted to enable the Student Government Association to take requests for additional expenditures of student activities fees according to specific purposes. In general, the grants are open to 1) a department sponsoring an activity that is open to the entire student body; 2) a recognized new student organization that did not have the opportunity to apply for funding through the Student Fees Advisory Board (SFAB); and 3) a recognized student organization that is collaborating with another recognized student organization on a new initiative that is open to the entire student body. See Appendix 5 for description of “Laker Grants.” The Laker Grants process will continue for the 2014-15 academic year, with announcements forthcoming for use of funds during the Spring semester.

1. **Special Course Fee: Structure and Processes**

Course Fees are those fees charged to students in specific programs or classes to cover supplementary costs for those courses, such as art materials, laboratory supplies, special equipment, etc. In 2009, Clayton State University established a Special Course Fee Review Committee to receive requests for new course fees, consider revisions for existing course fees, and audit the expenditures of existing course fees. The Committee convenes biannually to conduct business and makes recommendations to the Provost.

The Special Course Fee Committee is currently composed of all Course Fee Holders, a representative from Business and Operations, a representative from Student Affairs, and at least one student member and is currently chaired by one of the Course Fee Holders. The Communications and Accountability subgroups reviewed the processes for the course fee committee in depth and information is provided in the appropriate section below. See Appendix 4 that describes SFAB and the Special Course Fee Committee.

1. **Miscellaneous Fees: Structure and Processes**

Miscellaneous Fees are those fees that do not fall into the two other categories of Mandatory or Course fees and include fees such as an Enrollment Services Fee, Graduation Fee, Undergraduate Admissions Fee, and Transcript Fee, among others. (See Appendix 2 for a complete listing of current Miscellaneous Fees). There is currently no committee established to review requests for Miscellaneous Fees or to review the annual usage of those fees. As with the Course Fees, the Communications and Accountability subgroups reviewed the current processes for Miscellaneous Fees and are noted in the appropriate sections below.

1. **Subgroup Research**
2. **Mandatory Fee Committees at other USG Institutions**

In order to address a portion of the FWGII charge to re-evaluate the current structure of the Mandatory Fee Committee and consider the use of multiple fee committees to involve the broader campus community, research was conducted to review the composition and structure of fee committees at other USG institutions. The Mandatory Fee Committees at the following institutions were reviewed: University of West Georgia, Georgia State University, Kennesaw State University, Armstrong State University, and Columbus State University. Fee committees were reviewed by conducting research on the Internet and in some cases, follow-up phone calls with campus staff members.

There are a number of variations used by different campuses to organize their Mandatory Fee Committees. In addition, the information on the Mandatory Fee Committees across campuses is not easily located and/or existing in one accessible location on most institutions’ websites. Below is a general summary of the composition and processes for various Mandatory Fee Committees:

* At University of West Georgia, each mandatory fee has a separate committee that meets and makes recommendations to the President. On the Bursar’s office website and linked to other areas is a succinct description of each Mandatory Fee with reference to the committee or departmental office that manages the fee and makes recommendations regarding the fee (<http://www.westga.edu/bursar/index_13095.php>)
* At Georgia State University, there is a Student Mandatory Fee Committee that is similar to CSU’s SFAB to look at overall fee recommendations, increases, budget recommendations, etc. Within the student activities and technology fee areas, there are two separate committees that manage the processes for those two fees and either allocate funds across various campus groups or take proposals for fee usage from broader campus entities.
* At Kennesaw State University, the Student Activities Budget Advisory Committee (SABAC), makes recommendations to the President and Vice President for Student Success on the allocation of student activities funds across the student organizations and departments supported by student activities fees. The committee is composed of 16 members, 50% students; one note is that there are specific criteria listed as to category of student types solicited for committee appointment e.g. tradition student, nontraditional student, international student, student with a disability, etc. There is minimal information on how the other Mandatory Fee s are allocated. The information on the SABAC is found at the following link: <http://www.kennesaw.edu/studentsuccess/sabac.shtml>
* At Columbus State University, it is noted that with the exception of the Institutional Fee mandated by BOR policy, the Mandatory Fee s are approved by a fee advisory committee with students making up 50% of the committee membership.
1. **Interviews with Mandatory Fee Managers at Clayton State University**

In order to ascertain how decisions are made regarding the purposes and uses of the Mandatory Fees and who has input into the process for making those decisions, in-person interviews were conducted with each Mandatory Fee Holder. A copy of the interview protocol can be found in Appendix 6. In addition, copies of the typed responses to the interview questions are available upon request.

General themes that emerged from the interviews with Mandatory Fee Holders were related to a portion of the FWGII’s charge to review the current processes for individuals or groups to make requests as well the processes by which decisions are made regarding the usage of Mandatory Fee s as indicated below:

* All fee managers clearly stated the purposes and uses of the fees according to both Clayton State University and BOR guidelines and the importance of using Mandatory Fees to benefit students. They take seriously the process and structure currently in existence that requires them to report each Fall the previous year’s revenues and expenditures to SFAB and to hear SFAB’s comments regarding the following year’s budget each December before those recommendations go to the BOR.
* Fee managers are conscientious in obtaining input for the expenditure of fees from department managers, directors, frontline staff and others, and indicate at the granular level; it is not just one person’s decision on how to expend the fees, once the broad categories have been approved by the SFAB. Fee managers also use enrollment projections and historical data when considering budget and expenditures, and in many cases must make adjustments within fiscal year due to enrollment fluctuations.
* In some areas, e.g. with health fees, there is an ability to adjust uses/expenditures as students’ needs arise. For example, if there are repeated requests from students related to emerging health concerns and patterns, current funding can be redirected toward that need.
* In other areas, there is much less flexibility. For example with the Laker Card, funds must be spent on card-related expenses within very specific categories.
* For all Mandatory Fee areas, there are neither budgets with excessive funds nor much flexibility in amounts to spend. In most cases if there is a reserve, it has been allocated for a specific purpose and shared with SFAB ahead of time by way of the accountability meetings held each Fall semester to review the previous fiscal year’s revenue and expenditures.
* In recent years the amount of fees being collected has declined because of changes in enrollment and fee assessment decisions.

Information obtained through the research on other USG institutions’ Mandatory Fee Committees and the interviews with our current Mandatory Fee Holders will be discussed within the Analysis and Recommendations sections of this document.

# V. Communication & Accountability

The Communication and Accountability subgroups found that there was a tremendous amount of overlap in their research, analysis and recommendations. The Accountability subgroup was charged with reviewing the current systems of accountability and determining whether additional or different means are needed to communicate how the mandatory and course fees are used according to the purposes for which they were collected and allocated. The Communications subgroup conducted research on all of the communications associated with Mandatory Fees, Course Fees and Miscellaneous Fees. Consequently, the two areas will be presented together in the report. The research and methodologies will be explained separately but the overall conclusions and recommendations overlap and will be combined.

# Subgroup Research Overview

The Communications subgroup reviewed current Clayton State University’s and Board of Regents’ (BOR) processes and requirements, solicited feedback from other USG institutions, and created a survey for the Vice President of Student Affairs to complete on the Mandatory Fee Process. A survey was also created and sent to the Interim Provost and the current chair of the Course Fee Committee for feedback. The surveys addressed the five questions below. The subgroup also met with the Miscellaneous Fee Holders and interviewed them to obtain answers to the questions. Dr. John Campbell also conducted institutional website reviews to obtain information on the amount, type and accountability of Miscellaneous Fees.

The Accountability subgroup conducted its research and analysis by meeting with several Mandatory Fee owners, as well as members of the Student Fee Advisory Board and the Special Course Fee Committee. They reviewed information from several other institutions including: details regarding specific fees, fee-related policies, and fee website design. This subcommittee had a student representative who was helpful in coming up with ideas to improve awareness and transparency, and ensuring that all recommendations were reviewed from a student’s perspective.

A comparison of fee amounts between University System State Universities, and selected other Regional Universities and State Colleges in the vicinity was conducted. This proved difficult because few of these institutions provide a single location listing their fees. Clayton State University provides the simplest and most complete description of its Miscellaneous Fees among those institutions included in the comparison. Miscellaneous Fee information for one State University could not be determined (except check return fee). Miscellaneous Fee information for the three State Colleges was not available for most fees. Appendix 8 provides the comparison of Miscellaneous Fees.

**Subgroup Research**

The Communications subgroup wanted the following questions answered for each type of fee.

1. What do we currently do?
2. How do we communicate what we do?
3. Where do we communicate?
4. When or how often? Once a year? X weeks before meeting.
5. Who? Faculty, students, staff, others?
6. **Mandatory Fees-** See Appendix 2 for a list of fees.

Mandatory Fees are fees charged to all students, unless a specific waiver is in place.

1. What do we currently do?

Traditionally, the Assistant Vice President for Student Affairs communicates with the members of the Student Fee Advisory Board (SFAB), the Vice President for Student Affairs, the Budget Director and the Mandatory Fee Holders. The Mandatory Fee Holders are required to present to the SFAB each year which serves as a form of accountability. After the SFAB’s meeting, results are sent to the Vice President for Business Operations for review and approval. The SFAB’s recommendations are then shared with the Planning & Budget Advisory Council (PBAC). The President does a final review before the proposal is submitted to the Board of Regents for approval. BOR staff frequently contact the Vice President for Business Operations for additional data and justification.

Extensive dialogue occurs between the respective Fee Holders and the Vice Presidents and Cabinet prior to request for fee increases. Fee increases are also discussed with the Vice President of Business Operations and Fee Holders and departmental Vice Presidents as part of the process. In addition, the university prepares a budget narrative and attends a budget hearing with the system office staff and chancellor each year. Over the past several years, the Board of Regents has discouraged fee increases.

1. How do we communicate what we do?

Notification of the Mandatory Fee meetings to SFAB members is done by e-mail and phone calls to the student, staff and faculty members. Once the group completes its deliberations, the Fee Holders’ presentations and the SFAB’s recommendations are placed on the Fee Accountability Website. The recommendations are sent to the Budget Director and Vice President for Business Operations. The recommendations are provided to the PBAC for review and President for approval.

1. Where do we communicate?

After the Board deliberates, its recommendations are placed on the completed proposal forms that are sent to the Vice President for Business Operations by the university’s Budget Director. The Vice President reviews the form, and may discuss the results with the Vice President of Student Affairs or others. The Vice President then discusses the recommendations with the President and Planning & Budget Advisory Council. The resulting proposal is then transmitted to Board of Regents by the Budget Director once the President approves.

1. When or how often? Once a year? X number of weeks before meeting?

Communications about the upcoming SFAB meeting occur weeks before the meeting. Each Mandatory Fee Holder engages in review of the use of the fees during the year. In addition, Mandatory Fee Holders are required to submit 5-year plans to the Board of Regents and the Vice President for Business Operations.

1. Who? Faculty, students, staff, others?

Meeting Notification is sent to SFAB members. Recommendations are provided to Vice President for Business Operations, PBAC and President.

All information goes on the Fee Accountability website.

1. **Course Fees-** See Appendix 2 for a list of fees.

Course Fees are fees charged to students in certain programs or classes that consume additional materials (e.g. Laboratory Fees for the purchase of supplies.

1. What do we currently do?

E-mails are sent to all of the Course Fee Holders inviting them to attend biannual meetings (October and February). In September and January an email is sent out to academic divisions announcing that requests for new course fees or revisions to existing course fees must be sent to the chair of the committee by Oct. 1 (for course fees that will start the subsequent spring) or Feb. 1 (for course fees that will start the subsequent fall). (See Appendix 4). Committee members receive an email concerning the October meeting in September and the February meeting in January. The October meeting is typically scheduled within the first two weeks of October. The chair of the committee sends the committee members complete documentation for the entire new course fee requests before this meeting takes place (so members can do an initial review).

In addition to reviewing requests for new course fees, the committee also audits expenditures of existing course fees. This audit typically takes place during the October meeting of the committee. The chair of the committee sends out an email to all budget managers of the various course fees in September and asks those budget managers to prepare their course fee audits by October 1. The chair sends out all of the prepared audit forms to the committee members prior to the October meeting so that members can review them prior to the meeting. The committee sends the applications to the Student Government Association for review and comment. Committee recommendations for each request are sent to the Provost. If approved by the Provost, they are forwarded to the President and the Budget Office/Vice President for Business Operations for final review and Presidential approval.

1. How do we communicate what we do?

After the October meeting, the accountability information is sent to the Vice President for Business Operations and the Budget Director. The Vice President reviews the information; shares any changes with the President; and then approves the placement of the information on the Accountability website.

1. Where do we communicate?

There is no campus-wide communication about the meeting dates. The meeting invitation is only sent to committee members. However, new fee requests are solicited from each academic division. Results of the Course Fee Committee are made available to the entire campus online.

1. When or how often? Once a year? X weeks before meeting.

Meeting information is provided prior to each meeting to committee members. Accountability data is only added in late fall (November timeframe).

1. Who? Faculty, students, staff, others?

All have access to “after the fact” accountability data on the website

<http://www.clayton.edu/sfab>.

1. **Miscellaneous Fees-** See Appendix 2 for list of fees.

Miscellaneous Fees are those which do not fall into the two other categories of mandatory and course fees.

1. What do we currently do?

Miscellaneous fees are generally established through interdepartmental discussions between managers and Vice Presidents. However, information may be presented at Cabinet meetings. Discussions occur between Vice Presidents and the President. Discussions may also occur between VP for Business Operations and Budget Office with the proposing department when increases are proposed or needed. BOR policy does require the institution to notify the BOR about the adoption of certain fees. This information is provided to the BOR in the institution’s winter fiscal submission.

The Miscellaneous Fee Schedule is posted on the Bursar’s page and information is put inside Banner.

General accountability is provided via the University’s current budget procedures and the Vice President for Business and Operations and Controller’s review.

1. How do we communicate what we do?

New fee data is placed on website, announced in LakerLines, Banner, Laker Newsroom, etc.

1. Where do we communicate?

There aren’t any campus-wide communications. Generally, new fee requests are generated from each division on an as needed basis.

1. When or how often? Once a year? X weeks before meeting.

Only as needed.

1. Who? Faculty, students, staff, others

Impacted individuals.

Information may be shared at Cabinet meetings and with the Vice President of Business Operations and the Budget Director. Certain types of fees require an annual notice to the Board of Regents. (See Appendix 3).

1. **Analysis**

**Organizational Structures and Process Analysis**

In general, the structure and processes for the Student Fees Advisory Board (SFAB) and the Course Fee Committee are viable and provide a reasonable means for oversight of each area’s fee usage. Improvements based on the review of other institutions’ committees and discussion with fee holders and FWGII members can be made. As noted, there is no committee at this time to take requests or provide oversight for the Miscellaneous Fees.

Mechanisms also exist for the Mandatory Fee and Course Fee Holders to request new fees or ask for an increase in fee amounts. Redirection of current fees or avenues for alternative requests are currently handled through a subcommittee of the Student Fees Advisory Board that reviews and recommends a portion of the student activities fees allocated to registered student organizations. The SGA Laker Grants were piloted during fiscal year 2014 to provide an avenue for additional and alternative requests for activities fees based on specific criteria. There does not exist at this time a mechanism for alternative requests for usage of any of the other Mandatory Fees. The Special Course Fee Committee does have the ability to recommend the end of a fee or the redirection of the funds if they fall within the fee’s stated purpose.

**Communication and Accountability Analysis**

Overall, it appears that the Mandatory Fee and Course Fee Committees primarily communicate with the owners of the fees. Not very much communication goes out to the campus informing them of the upcoming committee or board meetings. Once the groups meet, results are finalized and the Mandatory Fee and course fee committees place their information on the university’s Accountability web page. However, communications regarding the placement of the data on the Accountability website are not disseminated throughout the campus. Information is not shared in any of the periodic Town Hall meetings, Administrative Council or other such meetings. However, the request for fees is shared with the Vice President for Business Operations, the Planning and Budget Advisory Council and the President prior to being moved forward to the BOR when required.

Miscellaneous Fees have primarily been an in-house process or back office function. The Fee Holders all have engaged in research by reviewing what other institutions charge, assessing the cost of the services they need to provide and collecting data on needed services and costs. An attempt was made to identify the individuals responsible for these fees. The subgroup contacted the individuals presumed to responsible for each fee to determine if the assignments were correct. Some adjustments were made based upon responses received. These Miscellaneous Fees are less well-defined than the other categories. Some appear to have been established administratively without clear rationale for the amount or the rationale was not recorded and has been forgotten. Many of the Miscellaneous Fee Holders use those funds strictly for students’ needs. A few will use the funds for staffing of positions that provide the needed services. Some of the Miscellaneous and Special Course Fees have generated surplus which at the end of the year were swept into the general fund. However, the Business and Operations staff has used those funds for items that support the students in a similar manner. For example, when the enrollment services fee had a recent surplus, the excess funds were used to help improve and purchase furniture for student study areas. When the course fees had a surplus, the additional fees were used for the purchase of microscopes.

After concluding its research and analysis, the subgroups have come to the conclusion that several improvements to communications, accountability, and structure/processes could be made at CSU.

1. **Subgroups Recommendations**

The subgroups have several recommendations to improve accountability, transparency and communications associated with the University’s fees. These suggestions will increase awareness amongst all members of the University of the importance, type and usage of the funds generated by these fees.

1. **Fee Website Recommendations**
2. Redesign website to make individual fee information more accessible and easier to find. Links to several sections should be visible on the main page without the need to scroll down.
3. Website should be modified into three main sections, left to right, showing information for Mandatory Fees, Special Course Fees, and Miscellaneous Fees. Subsection for each type of fee will be as consistent as possible (see Attachment – Student Fee Webpage). Hovering over the “Fees” link will show all fees under that fee type. Clicking on a particular fee will go to a one-page summary for that fee.
4. **Recommendations for all Fees**
5. Require each Fee Holder to use a template to present information to the SFAB committee and campus community. Additional information may be presented after the required template data. Require PowerPoints or reports standards with key topics. See Appendix 7.
6. Develop a standard 1 to 2 page summary of fee information. See Appendix 7.
7. Publish any minutes or reports.
8. Use multiple methodologies and venues to communicate information about the process, committees, SFAB and use of the funds.
	1. Redesign website—Links to: SFAB/Bursar/Business and Operation/Budget and Finance/President/Provost/Enrollment.
	2. Place meeting and other important dates on master calendar.
	3. Communicate via Newsroom, Bent Tree, etc.
	4. Discuss at SGA meetings, new leader training, mandatory first year class.
	5. Discuss in Planning & Budget Advisory Council and include information on Town Hall agenda.
	6. Include as a Budget Narrative topic, when appropriate.
	7. Include information in online student handbook, student surveys or other items.
	8. Possibly may use social media.
	9. Make students in CSU 1022 sections aware of online student handbook (all freshmen are required to take CSU 1022).
	10. Fall Student Forum.
	11. Develop brochure(s) with branding and justification (“Your dollars at work”).
	12. Revise current FAQ pages or create new pages.
	13. Report in Administrative Council, Faculty Senate, Staff Council. (Share key items from 5-year plans).
	14. Communicate to all about upcoming meetings.

E-mail. Faculty, Staff, Admin, (Senate Council).

* 1. Add information and link to Fee Accountability website to online student handbook.
1. **Mandatory Fee Recommendations**
2. Create one-page summaries for all fees. See Appendix 7.
3. Provide fee owners with an outline to follow when creating their PowerPoint presentations for fall SFAB meetings. Outline will differ slightly depending on if a fee increase is being requested or not. Following this outline will make the presentations more consistent and concise. (See Appendix 7, PowerPoint Outline for SFAB Presentations).

A. When providing financial data, fee owners will be asked to focus on significant changes and trends occurring over the last 3 years. A minimum of 3 years of data will be required if a fee increase is being requested.

B. Expenses should be shown in high level categories that are meaningful to most people (for example, don’t get too granular with CSU personal services line items). However, that data should be available upon request.

1. Voting results should be added to the Annual Review of Fee Usage section.
2. Continue to use one Mandatory Fee Advisory Committee, instead of a separate committee for each Mandatory Fee, in order to maintain the coherence and broad-based participation across the group of 16 individuals.
3. **Special Course Fees Recommendations**
4. To ensure uniformity of supporting financial documentation for all fees, the Annual Review of Fee Usage section should provide the following for each fee:
	1. Details regarding revenue and expenses (PS and OS&E)
	2. PeopleSoft Revenue Summary Report
	3. PeopleSoft Budget Progress Report – Summary
	4. Any other committee notes
	5. Include three (3) years of data.
5. If more than 10% of the revenue collected for a fee is not used for 2 consecutive years, this should trigger a discussion to consider lowering the fee.
6. Committee representation should be broader. Add at least 2 non-fee holder members.
7. **Miscellaneous Fees Recommendations**

**Miscellaneous Fees**

1. Establish a small Miscellaneous Fee Committee of five or fewer individuals. The majority of the members should not be Miscellaneous Fee Holders. We would recommend the chair be a person from the business office and that there be one student and a mix of fee and non-fee holders... Every three years require Miscellaneous Fee Holders to provide justification of fee amounts and use.
2. Create one-page summaries for all fees See Appendix 7.
3. A general policy statement should be added similar to that is provided for the other fees).
4. Implement a process for the periodic review of all Miscellaneous Fees:
5. Establish a committee to conduct periodic reviews and to determine appropriate supporting documentation for each fee.
6. Fees that go to general fund (returned check and late payment) should be reviewed by the AVP of Budget & Finance.
7. On the Bursar’s webpage:
8. On the menu on the left-hand side of the page, add a link under “Tuition & Fees” called “Fee Information & Accountability” which will go to the main fee webpage.
9. Under the headings for the fee info for each fiscal year, rename the link “Undergraduate Tuition” to “Undergraduate Tuition & Fees”.
10. At the bottom of the page, rename the heading “Other Fees” to “Other/Miscellaneous Fees”.
11. Move the following fees from the “Additional Fees” section to the “Other/Miscellaneous Fees” section:
12. Graduate school application fee
13. Graduation fee
14. Transcript fee
15. Undergraduate application fee
16. **Recommendations for Requesting New Fees or an Increase of Current Fees.**
17. **Current Process**
18. **Mandatory Fees**

1) Fee Holder realizes a need for a new fee or increase to existing fee in their area.

2) Plans for the proposed new fee or increase are discussed with the divisional Vice President and if sufficient justification is presented, approval given to present to SFAB.

3) Proposal with justification is resented to the SFAB.

4) SFAB Committee hears the proposal and votes whether to recommend moving the new fee or increase forward.

5) Recommendations from SFAB are then vetted by President, Vice President of Business Operations and Cabinet.

6) If approved by President and Cabinet, then the Vice President sends the proposed change to the Board of Regents for review and approval.

1. **Course Fees**

1) Faculty member or Department Chair realizes a need for a new fee or increase to existing fee for one of the courses.

2) Plans for the proposed new fee or increase is discussed with the Dean of the College and given approval to present to Special Course Fee Committee.

3) Proposal with justification is presented to the Special Course Fee Committee.

4) Special Course Fee Committee hears the proposal and votes whether to recommend moving the new fee or increase forward.

5) Recommendations from Special Course Fee Committee then must be approved by the Provost/Vice President of Academic Affairs.

6) If Provost/Vice President of Academic Affairs approves the request, then it must be approved by the President and Cabinet.

7) If approved by all parties, the new account is created by Budget Office and sent to Bursar’s Office for inclusion in the fee assessment process.

1. **Miscellaneous Fees**
2. There currently is no formalized process.
3. An administrator realizes a need for a new fee or increase to existing fee in their area.
4. Plans for the proposed new fee or increase are discussed with the divisional Vice President and if sufficient justification is presented, approval given.
5. Divisional Vice President then brings that proposal to the Vice President for Business Operations for approval.
6. **Recommendations**
	* + 1. **Mandatory Fees**

Consider developing a more detailed protocol for requests for new Mandatory Fee s or increases to current fees to engage the student body and to include possible steps: 1) presentation to SGA; 2) survey for student body and/or specific segments of student population; 3) development of timeline for all actions related to these requests to occur. Engagement would occur after initial discussions with appropriate Vice President and Cabinet and before presentation to SFAB. In addition, communication of the results of the SFAB’s conclusions to the campus community must be improved.

With regard to alternative requests for specific Mandatory Fees, the existence of Laker Grants and process should be better publicized and communicated for student activities fees. Should alternative requests be expanded in the future for specific Mandatory Fee s (e.g. student activities fees and technology fee) a decision will need to be made as to who will hear the alternative requests.

* + - 1. **Course Fees**

The current process is sufficient for proper vetting of any new fee or increase requests. However, the makeup of the Special Course Fee Committee should be changed to include members other than fee holders. The communication of the results of the Special Course Fee Committee’s conclusions must also be improved.

* + - 1. **Miscellaneous Fees**

The process must be formalized to include a form that would require approvals from all levels. A committee should be formed that includes one member from each division. The results of the committee’s conclusions should be communicated to the campus community on new requests and after the periodic three-year review.

1. **Retirement of Fees and Reductions in Fees.**
2. **Current processes, research and analysis**

Currently there are no processes in place for the retirement or reduction of fees. There is no specialized process in place; however, the current existing groups and boards should be able to handle this as part of their normal processing and procedures. Discuss implementation of recommended process for all three fees that addresses new responsibilities for the committees.

1. **Recommendations**

When an entity no longer needs the fees because the purpose has been met, the overarching goal of the University will be to stop charging that fee. If the current fee holder has another need, then a case for the transformation of that fee to cover the new item can be made. This would be done with the same level of transparency, accountability and communication that currently exists.

1. **Conclusion**

The group devoted a lot of time and effort during its research and analysis. We determined we are one of the most transparent of all USG institutions with publishing our fees, policies, and accountability processes. It also appears that we have established the most robust accountability procedures. However, we need to regularly inform our campus community about fees and their uses. Overall, we are comfortable with processes for SFAB and the Special Course Fee Committee; however, we think standardizing the templates and budgetary information that is presented will help make it more consistent and usable for our campus community. Our recommendation to place the information in more locations and communicate in more campus forums will make the information more accessible and widely available. The Miscellaneous Fees have traditionally been handled as a back office function. We think some of the same processes used for SFAB and Special Course Fee Committees can be adopted for the Miscellaneous Fees.

We are committed to maintaining affordability and transparency for our students and campus community and are appreciative of the opportunity to take this close look at our student fees. Our research shows that our fee holders use their funds appropriately and for the benefit of the students and the campus.

1. **Appendices - One (1) through Eight (8) are attached.**

**Appendix 1 - Charge to the Fee Work Group II and List of Members**

**Appendix 2 - List of Mandatory, Special Course and Miscellaneous Fees**

**Appendix 3 - Policies and Procedures of the Board of Regents**

**Appendix 4 - Student Fee Advisory Board and Special Course Fee Committee Policies**

**and Procedures**

**Appendix 5 - Laker Grants Information**

**Appendix 6 – Additional Working Papers of the Fee Work Group II**

**Appendix 7 - Recommended Templates and Forms**

**Appendix 8 - Clayton State University and University System of Georgia**

**Miscellaneous Fee Research**

**APPENDIX #1**

**Fee Work Group II**

**Charge and Members**

**FEE WORK GROUP II**

**CHARGE**

*Review current systems of accountability and determine whether additional or different means are needed to communicate how the mandatory and course fees are used according to the purposes they were collected and allocated.*

*Reassess how best to communicate the purposes of the fees, the current processes for individuals/groups to make requests, and the transparency for the evaluation of the uses for fees relative to initial requests; in addition review how decisions are made within the Mandatory Fee areas, how to communicate to the campus community, whether changes are needed, and, if so, recommendations for those changes.*

*Re-evaluate the current structure of the fee committee – in order to involve the broader campus community, the work group might consider the use of multiple committees, tasked with review of specific Mandatory Fees, and how such a process could allow for a closer review of allocations or a consideration of alternative requests for allocations before said allocations are made.*

**FEE WORK GROUP II**

**MEMBERSHIP**

*Ms. Carolina Amero AVP, Auxiliary & Administrative Services*

*Dr. John Campbell Associate Dean College of Arts & Sciences*

*Mr. Donal Christian AVP/Controller, Budget & Finance*

*Ms. Corlis Cummings Vice President, Business & Operations*

*Dr. Kevin Demmitt Interim Provost and Vice President, Academic Affairs*

*Mr. Timothy Duncan Athletics Director, Athletics*

*Mr. Bill Gruszka Interim VP of Information Technology and Services*

*Dr. Elaine Manglitz Vice President, Student Affairs*

*Mr. Scott McElroy Budget Director, Budget & Finance*

*Mr. Khalid Rajahn Student Fee Advisory Board*

**APPENDIX #2**

**Lists of Mandatory, Special Course and Miscellaneous Fees**

* + 1. **Mandatory Fees**
		2. **Special Course Fees**
		3. **Miscellaneous Fees**

|  |
| --- |
| **MANDATORY FEES** |
|  |  |  |  |  |
| **Description of Fee** | **Rate per semester** | **On Campus Fees ≤ 3 Hrs** | **Off Campus Fees** | **On/Off Campus Fees ≤ 4 Hrs** |
| **Laker Card Fee** | **$20** | **$20** | **$20** |  |
| **Student Activity Fee** | **$60** | **$30** | **$30** |  |
| **Athletic Fee** | **$160** | **$80** | **$80** |  |
| **Health Fee** | **$46** | **$23** | **$23** |  |
| **Parking Fee** | **$34** | **$17** | **$17** |  |
| **Student Activity Center Fee** | **$100** | **$100** | **$50** |  |
| **Technology Fee** | **$57** | **$57** | **$57** |  |
| **Institutional Fee** | **$250** |  |  | **$125** |

|  |
| --- |
| **SPECIAL COURSE FEES** |
|  |  |
| **Description of Fee** | **Rate per Semester** |
| **Applied Music Courses Fee** | **$20** |
| **Art Courses Fee** | **$40** |
| **Business Program Fee (Per semester Business Majors)** | **$41** |
| **Computing Systems Fee (Maximum $100 per semester)** | **$50** |
| **Dental Hygiene Lab Courses Fee** | **$35** |
| **HFMG 2110 First Aid & CPR Course Fee** | **$47** |
| **HFMG Lab Courses Fee** | **$35** |
| **MBA Dolce Center Course Fee** | **$710** |
| **Natural Sciences Lab Courses Fee** | **$35** |
| **Nursing Program Fee (Per semester Nursing Majors)** | **$283** |
| **PTC Course Fee (Per Credit Hr/Max 120)** | **$20** |
| **RN-BSN Course Fee** | **$35** |
| **Teacher Education Internship Course Fee** | **$100** |
| **Teacher Education Practicum Course Fee** | **$25** |
| **Telecourse/Online Course Fee** | **$35** |

|  |  |
| --- | --- |
|  |  |
|  |  |
| **MISCELLANEOUS FEES** | **Rate per Semester** |  |  |  |
|  |  |  |  |  |
| **Undergrad Admissions Application Fee** | **$40** |
| **Graduate School Application Fee** | **$75** |
| **Dental Hygiene Application Fee** | **$25** |
| **Enrollment Services Fee (only paid 1st semester of attendance)** | **$15** |
| **Graduation Fee** | **$35** |
| **Late Registration Fee** | **$100** |
| **Transcript Fee** | **$5** |
| **Return Check Fee** | **$30** |

**APPENDIX #3**

**Policies and Procedures of the Board of Regents**

## **Board of Regents Policy Manual**

## **7.3.2 Student Fees and Special Charges**

### 7.3.2.1 Mandatory Student Fees

Mandatory student fees are defined as fees that are paid by all students as required by the Board of Regents or as required by the institution subject to approval by the Board of Regents. When there is a change in the purpose of the mandatory fee, it shall be subject to approval by the Board of Regents (BoR Minutes May 2010).

Mandatory fees shall include, but not be limited to:

1. Intercollegiate athletic fees;
2. Student health service fees;
3. Transportation or parking fees (if the latter are charged to all students);
4. Student activity fees;
5. Technology fees; and
6. Facility fees. (BoR Minutes, January 2010)

All mandatory fees shall be approved by the Board of Regents at its meeting in April to become effective the following fall semester. Exceptions to this requirement may be granted upon recommendation of the Chancellor and the approval of the Board of Regents.

An institution may waive mandatory fees for students who are enrolled for fewer than six (6) credit hours. Alternatively, institutions may prorate mandatory fees on a per-credit-hour basis for students taking fewer than twelve (12) credit hours. Institutions may elect to reduce Board-approved mandatory fees for students enrolled in summer courses.

Proposals submitted by an institution to increase mandatory student fees, proposals to create new mandatory student fees, or a change in the purpose of a mandatory fee, shall first be presented for advice and counsel to a committee at each institution composed of at least fifty percent (50%) students, except in special circumstances when a general purpose fee is instituted system-wide by the Board of Regents (BoR Minutes, June 2009, revised May 2010). The committee shall include at least four students, who shall be appointed by the institution’s student government association. Institutions and student government associations should make a concerted effort to include broad representation among the students appointed to the committee (BoR Minutes, January 2010).

All mandatory student fees collected by an institution shall be budgeted and administered by the president using proper administrative procedures, which shall include the advice and counsel of an advisory committee composed at least fifty percent (50%) students, except in special circumstances when a general purpose fee is instituted system-wide by the Board of Regents (BoR Minutes, June 2009). The committee shall include at least four students, who shall be appointed by the institution’s student government association. Institutions and student government associations should make a concerted effort to include broad representation among the students appointed to the committee (BoR Minutes, January 2010).

Mandatory student fees shall be used exclusively to support the institution’s mission to enrich the educational, institutional, and cultural experience of students (BoR Minutes, January 2010). All payments from funds supported by student mandatory fees shall be made according to approved business procedures and the appropriate business practices of the institution (BoR Minutes, 1999-2000, p. 364).

### 7.3.2.2 Elective Fees and Special Charges

Institution presidents are authorized to approve elective fees and special charges as outlined below; however, any fee or special charge that is required to be paid by all fulltime, undergraduate students at the institution or by all undergraduate students in a specific degree program, with the exception of specific course fees for supplementary costs, shall be approved by the Board (BoR Minutes, January 2010).

**Housing Fees**

Housing fees are defined as fees paid by students who elect to live in institutional residential facilities. All housing fees, except for housing fees that are proposed to support debt service and operating costs on new housing projects funded with private funds, shall be approved by the institution president in April of each year. The housing fees that support debt service shall be approved by the Board (BoR Minutes January 2010). Each institution shall notify the Chancellor annually of all institutionally-approved housing fees (BoR Minutes, February 2007; January 2010).

**Food Service Fees**

Food service fees are defined as fees paid by students who elect to choose an institutional food service plan. All elective food service fees and those required for residential students shall be approved by the institution president in April of each year. All food service fees that support debt service shall be approved by the Board. Each institution shall notify the Chancellor annually of all institutionally-approved food service fees (BoR Minutes, January 2010).

**Other Elective Fees and Special Charges**
Other elective fees and special charges are defined as those fees and charges that are paid selectively by students. These fees and charges may include, but are not limited to:

1. Resident hall deposits;
2. Penalty charges;
3. Non-mandatory parking fees and parking fines;
4. Library fines;
5. Laboratory fees;
6. Post office box rentals; and
7. Course fees to cover supplementary costs for specific courses, such as art materials, course packets/kits, software/videos, and special equipment (BoR Minutes, January 2010).

Institutional presidents are authorized to establish and adjust these fees, as appropriate. Prior to implementation of such fees, institutions shall be required to report to the Chancellor any establishments and adjustments made thereto under procedures established by the USG chief fiscal officer (BoR Minutes, January 2010).

**Continuing Education Fees**

Institutional presidents shall be authorized to establish fees for non-credit-hour courses and programs as defined in [Section 5.2 of this Policy Manual](http://www.usg.edu/policymanual/section5/policy/5.2_lifelong_education/).

7.3.3 Tuition and Fee Payment and Deferral

All tuition and fees (mandatory and elective) are due and payable upon registration. Exceptions to the time of payment are as follows:

1. An institution may defer tuition and fees up to the amount authorized for a specific academic term for students whose fees are guaranteed and will be paid by an outside agency under a documented agreement with the institution.
2. An institution may defer tuition and fees up to the amount of the aid granted for a specified academic term for students who have an institution-administered loan or scholarship in process.
3. An institution may defer tuition and fees up to the limit stated in the certificate or other document for a specified academic term for foreign students who have a certificate or other acceptable documented evidence that payment will be made after a statement of charges from the student has been presented for payment.
4. An institution may elect to collect fees specifically for housing on an installment basis, in advance of service provided (BoR minutes Jan. 2012).
5. An institution filing an approved plan with the Office of Fiscal Affairs may elect to collect tuition and mandatory fees on an installment basis, in advance of services provided (BoR minutes, April 2012).

**Business Procedures Manual**

# 8.3 Tuition and Fees

Each year, the Board of Regents establishes tuition and mandatory fee rates for all USG institutions. Although rates are linked to formula funds through a cost sharing percentage – 75% of formula cost is borne by the state, 25% is borne by students – actual rates may be adjusted annually according to a host of factors. Institutions are authorized to request differential tuition rates for nationally-competitive graduate and professional programs and are authorized to set rates for distance learning courses and programs, subject to the restriction that rates cannot be less than those established by the Board of Regents for resident undergraduates at each institution.

Mandatory fees are fees charged to all enrolled students. They include, but are not limited to, fees for intercollegiate athletics, student activities, student health services, parking, transportation, and/or facilities development.

## **8.3.1 Tuition – Revenue Projections from Institutions**

In September each year, each USG institution completes and submits the **Revenue Projections** form to Fiscal Affairs. It includes the following components:

1. Actual revenue from various sources for the prior year
2. Budgeted revenue for the current year
3. Amended revenue for the current year
4. Projected revenue for the following year
5. Amount of revenue generated from a 1% increase in tuition
6. Impact on the HOPE program from a 1% increase in tuition

The revenue projections are used to:

* Compute the funds generated from various levels of tuition increase
* Determine the impact on HOPE at various levels of tuition increase
* Adjust the internal revenue on the institution’s allocation sheet for the original budget for the following year

The Board determines the tuition rate increase for all USG institutions.

**8.3.2 Mandatory Fees**

All mandatory fee requests are due from the institutions to Fiscal Affairs in December. Institutions must submit a **fee request package**. Each fee request package includes the following:

1. Summary of fee requests including revenue
2. Detail of revenue projection for each mandatory fee
3. Financial data form with actual and projected revenues and expenditures
4. Mandatory student fee participation form

In accordance with Board Policy 7.3.2.1, institutions must have a Fee committee; composed of at least fifty percent (50%) students, except in special circumstances when a general purpose fee is instituted system-wide by the Board of Regents. The committee shall include at least four students, who shall be appointed by the institution’s student government association (SGA). This committee is charged with reviewing and voting on the student fee request. The form shows the names of the student fee advisory committee members and their vote on the action. The Board of Regents does not require approval of the request by the committee.

Analysts in Fiscal Affairs review the fee requests submitted by each institution. After review, Fiscal Affairs makes recommendations to the Chancellor and the Board of Regents.

**8.3.3 Housing and Food Service Fees**

All housing and food service fee requests are due from the institutions to Fiscal Affairs in January. Institutions must submit these along with their fee request package. Each request must include the following:

1. Summary of requests including revenue impact
2. Detail of revenue projection for each type of fee
3. Financial data form with actual and projected revenues and expenditures

In addition, reserve amounts for auxiliary enterprises should be detailed with projected future expenditures. Analysts in Fiscal Affairs review the fee requests submitted by each institution. After review, Fiscal Affairs makes recommendations to the Chancellor and the Board of Regents.

**8.3.4 Miscellaneous Fees**

Institutions are required to submit an updated list of all Miscellaneous Fees in January. The president of each institution has the authority to approve Miscellaneous Fees.

**Note:** Reporting to the Board is for informational purposes only.

## **8.3.5 Approval of all Tuition and Fees**

The Board of Regents approves tuition rates and all mandatory fees in April. The Chancellor approves housing and food service fees at the same time.

**APPENDIX #4**

**Student Fee Advisory Board**

**and**

**Special Course Fee Committee**

**Policies and Procedures**

**Student Fees Advisory Board (SFAB) at Clayton State University**

**Mandatory Student Fees**

*All mandatory student fees collected by an institution shall be budgeted and administered by the President using proper administrative procedures, which shall include the advice and counsel of an advisory committee, composed of at least 50 percent students. Students shall be appointed by the institution’s student government association. All payments from funds supported by student mandatory fees shall be made according to approved business procedures and the appropriate business practices of the institution. Proposals to increase mandatory student fees and proposals to create new mandatory student fees shall first be presented for advice and counsel to a committee at each institution composed of at least 50% students (7.3.2.1., Policy Manual).*

*Mandatory student fees are defined as fees which are paid by all students as required by the Board of Regents or as required by the institution subject to approval by the Board of Regents. Mandatory fees shall include, but not be limited to, intercollegiate athletic fees, student health service fees, transportation or parking fees (if the latter are charged to all students), student activity fees, and technology fees.*

**Purpose of the Student Fees Advisory Board (SFAB)**

The **Student Fees Advisory Board** (SFAB) at Clayton State University is established to 1) review all budgets for allocation of mandatory student fees and make recommendations regarding support, modification, or non-support prior to submission to the Board of Regents; 2) review all proposed changes in Mandatory Fees and make recommendations regarding proposed changes prior to submission to the Board of Regents; and (3) review all revenues and expenditures for each Mandatory Fee according to accountability guidelines outlined below.

A subset of members of the SFAB (composed of at least 50% students) will review all proposed budgets and recommend distribution/allocation of the portion of the student activity fees designated each academic year to registered student organizations and make recommendations to the Vice President of Student Affairs. The Vice President may support or modify the budgets before submitting them to the President with the recommended budget.

**Composition of Committee**

The Student Fees Advisory Board (SFAB) is a standing committee of Clayton State University. The composition of the Board is 50% students and 50% faculty/staff, with 16 total members.

* Eight (8) students are appointed to the committee by the President of the Student Government Association, as required by BOR policy. Student members must have completed a minimum of 24 semester hours at CSU with a grade point average of 2.5 or higher. Student members should be full time, degree-seeking students. Student members are appointed for one-year terms but may be reappointed by the Student Government Association. No student will serve more than two terms.
* The Assistant Vice President of Student Affairs in consultation with the Vice-President of Student Affairs will appoint five (5) faculty members to the committee, one from each school/college. Faculty members will first be advised of the possible appointment and of the requirements of serving on the SFAB. Those who cannot make a commitment to serve will be bypassed in favor of those who are able to make a commitment. Recommendations from the Provost and Dean’s Council may be solicited in order to identify possible faculty members to serve on the SFAB. Faculty members will serve two-year terms and following a one-term break in service may be reappointed. Terms are staggered in order to provide continuity and efficient committee functioning.
* The Vice President of Student Affairs will identify administrative staff members to fill two (2) staff positions on the committee. Staff members will serve two-year terms and following a one-term break may be reappointed.
* SFAB is chaired by the Assistant Vice President of Student Affairs. The chair will maintain records of all committee actions, monitor compliance with all policies and procedural requirements associated with Mandatory Fees, advise the SFAB on these matters; and work with the CSU Budget Office to implement the procedures related to the Mandatory Fees on campus.
* Term of service is July 1-June 30 annually or bi-annually.

**SFAB Attendance Policy**

Attendance at SFAB meetings is expected; therefore, the time commitment needed should be considered when making the decision as to whether or not to accept appointment to the board. Prior notification of absence due to legitimate conflicts should be sent to the Associate Vice President of Student Affairs at least 5 days prior to the scheduled meeting. Board members are allowed three absences from scheduled meetings during any academic year. Any member who has more than three absences will be asked to leave the committee.

Quorum and voting: A minimum of 3/4s of the members of the SFAB should be present to establish a quorum at any meeting. Members must be present to vote. Proxy voting will not be allowed. A simple majority (one more than 50 percent of the votes) is required for any vote taken at the SFAB meetings.

**Procedures for Mandatory Student Fees**

During Fall semester, the Board of Regents provides financial data forms for each Mandatory Fee to the Budget office at Clayton State University. The data forms are completed by the Budget office and/or fee budget manager for each fee. If an increase or a new fee is proposed, additional information is requested and provided to the SFAB. This information is in the form of a written proposal and includes the following information:

* Amount of the fee request
* Intended uses of the fee
* Effect on operations if new fee or fee increase not obtained
* Amount currently in reserve/fund balance and the planned uses of that amount
* Trend analysis associated with fee over the last 10 years and how any increases to date have been utilized.

Fee budget managers may also provide attachments with financial data to support requests for new fees or fee increases.

Meetings are scheduled for SFAB to review each proposal related to new or fee increase requests. The fee budget manager from each area provides a brief presentation related to the requests and answers any questions from SFAB. In addition, the financial data forms for each Mandatory Fee budget are provided to SFAB for review.

In order to make the financial data form categories more illustrative for how the fees are used, additional and more detailed information may be requested from each fee manager if there are any categories that are not as descriptive as needed to provide information to the SFAB in order for them to make their recommendations.

SFAB votes to recommend each fee budget *and* any requests for new fees or fee increases. The votes are recorded on the Mandatory Student Fee Participation form, signed by the committee chair and the Chief Business Officer, and forwarded to the vice Chair of Fiscal Affairs at the Board of Regents by the Budget Office at Clayton State University within the timelines provided by the Board of Regents.

**Accountability and Usage of Mandatory Fees**

Internal controls over usage of Mandatory Fees shall be sufficient to ensure proper fiscal accountability. After the close of each fiscal year, the Student Fees Advisory Board (SFAB) will meet to review the actual revenue and expenditures for the mandatory student fees as compared to the proposed budget for same fiscal year noted on the Financial Data forms reviewed the previous fall semester. This meeting will occur no later than October 31st of each year. Minutes of the meeting(s) will be taken, and the minutes along with any recommendations will be forwarded to the SFAB and the fee managers for review.

Specific details for each fee manager to use for reporting revenue and expenditures will be developed to include the following:

* Actual vs. projected revenues
* Actual vs. projected expenditures in the categories as listed on the Financial Data forms reviewed during Fall semester
* Description of variances in any category greater than 10% and a written explanation as to reason for variance
* Statement of amount in reserve for each Mandatory Fee and any updated information as to how the reserve will be used

**Records Management**

All Mandatory Fee forms and minutes of the meetings will be maintained by the Budget Office for a period of 5 years.

**Special Course Fee Information**

**Special Course Fee Requests**

Board of Regents policy section 7.3.2.2 sets out the other elective and special charges that students can be charged by institutions. The section states:

7.3.2.2 Elective Fees and Special Charges

**Other Elective Fees and Special Charges**

Other elective fees and special charges are defined as those fees and charges that are paid selectively by students. These fees and charges may include, but are not limited to:

1. Resident hall deposits;
2. Penalty charges;
3. Non-mandatory parking fees and parking fines;
4. Library fines;
5. Laboratory fees;
6. Post office box rentals; and
7. Course fees to cover supplementary costs for specific courses, such as art materials, course packets/kits, software/videos, and special equipment (BoR Minutes, January 2010).

Institutional presidents are authorized to establish and adjust these fees, as appropriate. Prior to implementation of such fees, institutions shall be required to report to the Chancellor any establishments and adjustments made thereto under procedures established by the USG chief fiscal officer (BoR Minutes, January 2010).

The University currently collects thirteen Special Course Fees from its students. Only students enrolled in the course or program are assessed the fee. The amount charged for each Special Course Fees is available at [http://adminservices.clayton.edu/registrar/fees.htm](http://www.clayton.edu/registrar/fees.htm). The University has created a Special Course Fee Committee comprised of faculty, administrators and students to review Special Course Fee requests.

**OVERVIEW OF PROCESS TO APPROVE OR MODIFY SPECIAL COURSE FEES**

* Course fees requests are generated in the department (or in the College or School if there are no departments) that needs the fee. All requests must be submitted using the Application for New or Revised Course/Program Fee form.
* The request is reviewed and approved by the dean and/or department head and then transmitted to the chair of the Special Course Fee Committee. Course fees to be assessed fall semester must be submitted to the committee by February 1. Course fees to be assessed beginning spring semester must be submitted by October 1. All program fees must also be submitted by October 1. Exceptions to these deadlines for business reasons require special approval from the Budget Office.
* The Special Course Fee Committee will send the applications to the Student Government Association for review and comment.
* Special Course Fee Committee recommendations for each request will be sent to the Provost.
* If approved by the Provost, the will be forwarded to the President and the Budget office for final review and Presidential approval.

After the Special Course Fee Committee completes their review, their recommendations of approval, denial or modification the fee amount should be forwarded to the President and the Budget office for final review and Presidential approval. The recommendation should include the course name, number, title, purpose of the fee, when the fee was going to be required and collected, the fee amount, projected revenue, and how the revenue would be used. Approved requests will generally take effect the following Fall Semester unless business needs require an earlier implementation.

**APPENDIX #5**

**Laker Grants Information**

 **Laker Grant Application
2014-2015**

**General Information**

**Purpose**

The purpose of the Laker Grant is to support recognized student organizations and university departments through funding of events and programs that promote the following:

* Active Learning
* Student Success
* Inclusiveness
* Ethics & Integrity
* Community Engagement

**Who Is Eligible?**

To be eligible for a SGA Laker Grant award, you must be one of the following:

* A department sponsoring an activity that is open to the entire Student Body;
* A recognized New Student Organization that did not have the opportunity to apply for funding through the Student Fees Advisory Board (SFAB);
* A recognized student organization that is collaborating with another recognized student organization on a new initiative that is open to the entire Student Body.

**Permitted and Prohibited Expenses**

The SGA Laker Grant can fund the following expenses/activities:

* Fees for contractual services
* Speaker honorariums
* Advertising and promotions
* Event supplies (some restrictions apply)

The SGA Laker Grant award ***cannot*** fund the following expenses/activities:

* Alcohol
* T-shirts
* Academic Programs if the primary purpose is for classroom instruction
* Charitable contributions or donations
* Food and Beverages
* Fundraising
* Gifts and give-a-ways
* Scholarships
* Members-only banquets or awards ceremonies
* Organizational dues and fees
* Party/Event Planners
* Payment to or purchases for organization members for service with the organization
* Any expense associated with events that are not open to the entire Student Body
* Any expense prohibited by the Board of Regents or the Clayton State University, Division of Student Affairs Budget Office

**Guidelines**

**Application Submission**

* Applications for the SGA Laker Grant must be completed in its entirety. All signature fields must be handwritten. Recognized student organizations must obtain their advisor’s approval and university departments must obtain their director’s approval before requests will be processed.
* All recognized student organization requests must be submitted by the President or by the financial officer of an organization.
* All applications must be ***typed*** and turned in to the SGA office, located in Suite 202 of the Student Activities Center, ***a minimum of four (4) weeks prior to the event, program, or activity***. Late submissions ***will not*** be considered, and emailed applications will not be accepted.
* Providing ample details of the event’s expenses greatly enhances the organization’s chances of being approved. An itemized list should be included with the co-sponsorship application.
* A request for SGA Laker Grant funds cannot be made for an event that was already budgeted for the academic year and decided for by the Student Fees Advisory Board (SFAB).
* The budget request for the SGA Laker Grant sponsored events must be itemized for each specific item or activity.
* Events supported fully or partially by the Laker Grant shall not charge admission.

**Review and Approval Process**

* Laker Grant applications will be reviewed first by the SGA Committee of Fiscal Affairs then will be voted on by the Student Government Association full board for approval of the amount of funds to be allocated.
* Organizations or departments completing an application for funding must provide a brief presentation during a regularly scheduled SGA session meeting. The presentation must include the purpose of the funding request and how the activity or program benefits the Student Body.
* Upon approval of the request, a notification letter will be sent to the organization/department stating the amount of the grant awarded and instructions for use of funds.

**Disbursement of Funds**

* Prior to the disbursement of any funds, the requestor must contact the SGA Student Body Treasurer ***within three (3) business days*** of notification of approval to schedule a meeting with the Student Body Treasurer. The meeting will serve to coordinate approval for purchases and creation of marketing materials.
* The SGA Advisor will facilitate the purchase of the approved items. The SGA Advisor must be consulted prior to any purchases being made. Under no circumstance should an organization’s member spend their own personal funds without prior approval from the SGA Advisor.
* All invoices and receipts should be submitted within a minimum of two (2) weeks after the event. Receipts not received within this time will no longer be eligible for Laker Grant reimbursement.
* Tax will not be reimbursed for items purchased. The University Tax Exemption Certificate can be downloaded from the Clayton State University, Procurement Services website: <http://www.clayton.edu/procurement/procurementforms>.
* The organization must submit a post-Laker Grant assessment a minimum of two (2) weeks after the closing of the funded event. The post application will consist of a series of questions describing the outcome of the event or program, how the event was beneficial to Clayton State University, and if all allocated funds were used in their entirety.
* All events must include an evaluation form for event attendees to complete unless otherwise stated based on the nature of the funded program.

**Questions?**

* For questions regarding the SGA Laker Grant, please contact Joshua Davis, Student Body President at jdavis86@student.clayton.edu or Natasha Hutson, Student Government Association Advisor at NatashaHutson@clayton.edu.

**Section I: General Information**

Organization/Department:

Point of Contact:

Position within Organization/Department:

Telephone Number:

E-mail Address (must be a Clayton State University email address):

Advisor or Department Head:

Name of Event:

Date of Event:

Location of Event:

**Section II: Focus Questions**

1. Describe the organization/department’s mission, goals, and achievements.
2. Describe the purpose and goals of the event or program for which you are requesting the SGA Laker Grant.
3. Describe how the event promotes active learning, student success, inclusiveness, ethics/integrity, and/or community engagement.\
4. How will the entire student body benefit from this event or program?
5. Have you ever provided this type of or a similar program on the campus of Clayton State University before? If so, describe the event, materials used, and evaluation results of the event.

**Section III: Financial Information**

Amount of funding requested from SGA Laker Grant: $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Use the table below to provide an itemized list of expenses needed to complete your requested program.

|  |  |
| --- | --- |
| **Description of Expense** | **Amount** |
|  |  |
|  |  |

*I hereby verify that the above information is accurate to the best of my knowledge. I have read and do understand the above guidelines regarding the SGA Laker Grant funding process. I further acknowledge that failure to follow the guidelines set forth may result in forfeiture of the approved funding or denial of reimbursement.*

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name: Org. / Dept. Representative Signature: Org. / Dept. Representative Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name: Organization President Signature: Organization President Date

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Print Name: Advisor/ Director Signature: Advisor/ Director Date

**Laker Grant Frequently Asked Questions**

**Who can apply for the Laker Grant funding?**

*Any recognized student organization or campus department may submit an application for Laker Grant funds. Recognized student organizations are determined by the Department of Campus Life.*

**Is there a cap or the amount requested?**

*Each request is reviewed and the amounts are allocated on a case-by-case basis. The monetary cap for the 2013 – 2014 academic year is $500. If more funds are needed for a requested event, the requestor can set up a meeting with the Student Body Treasurer to propose the requested amount.*

**Are late applications accepted?**

*Late applications will not be accepted under any circumstances. Applications must be turned in four (4) weeks prior to the event date or four (4) weeks prior to when the funds are needed.*

**When will the organization receive confirmation that the application was received?**

*The SGA Student Body Treasurer will notify your organizations that your application was received within 2 to 5 business days of its receipt.*

**When will the organization know whether the request was approved or denied?**

*You will be notified via email from the SGA Student Body Treasurer within two (2) weeks acknowledging approval or denial of the request.*

**If a funding is denied, is there an appeals process?**

*Yes. If you would like to know why the request was denied and potential ways to strengthen the application, contact the SGA Student Body Treasurer. Participation in the appeals process does not guarantee funding; it only indicates that the request may be reconsidered.*

**How do we receive the money?**

*The SGA Advisor will process all financial transactions related to the expenditure of Laker Grant funds. Student organizations must contact the SGA Student Body Treasurer within three (3) business days of notification of approval to schedule a meeting to discuss the purchases needed for the event.*

**Laker Grant Post – Assessment**

*The Student Government Association is interested in hearing how your event went! Please answer the post – assessment questions below to help us understand the outcome of the event.* ***Please submit this form no later than two (2) weeks after the event to the Student Government Association office located in the Student Activities Center Suite 202.***

1. Explain how all allocated funds requested from the SGA Laker Grant were used. Were they used in their entirety? If all allocated funds were not used, how much was left over? Explain why funds were not used.
2. Describe how the Clayton State University student body responded to the event. Did the event meet or exceed expectations? Please explain how it did or did not.
3. Will you be interested in providing the program again? Describe suggestions to improving the event for future endeavors. How will be funding be secured in the future?

**APPENDIX #6**

**Additional Working Papers**

**Are**

**Available Upon Request**

**Mandatory Fee Communication Survey**

Please complete this short survey on communications that are sent out regarding Mandatory Fee s:

1. Do we send any notice of the upcoming SFAB meeting to:
2. Any members of the student body other than SFAB members? Yes No
3. Any faculty or staff other than the fee holders? Yes No

No with the exception of faculty/staff SFAB members, Brandi Alkire

1. Any notices of SFAB upcoming meetings in

Laker Lines Yes No

Email Yes No

Newspaper Yes No

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

1. If we do communicate with others

Whom\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

When\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

How­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Frequency­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Once the meeting is over and the votes concluded, do you send any information of the outcome to anyone other than the SFAB members and VP for Business Operations? If yes, (List the names and info sent)

Brandi Alkire

1. Do you send the SFAB website information to any campus stakeholder or member?

I have sent upon request to Ceimone Strickland and Cheryl Jordan.

1. How do we select SFAB members?

The Student Fees Advisory Board (SFAB) is a standing committee of Clayton State University. The composition of the Board is 50% students and 50% faculty/staff and includes 16 total members.

* + Eight (8) students are appointed to the committee by the President of the Student Government Association, as required by BOR policy. Student members must have completed a minimum of 24 semester hours at CSU with a grade point average of 2.5 or higher. Student members should be full time, degree-seeking students. Student members are appointed for one-year terms but may be reappointed by the Student Government Association. No student will serve more than two terms.
	+ The Associate Vice President of Student Affairs in consultation with the Vice-President of Student Affairs will appoint five (5) faculty members to the committee, one from each school/college. Faculty members will first be advised of the possible appointment and of the requirements of serving on the SFAB. Those who cannot make a commitment to serve will be bypassed in favor of those who are able to make a commitment. Recommendations from the Provost and Dean’s Council may be solicited in order to identify possible faculty members to serve on the SFAB. Faculty members will serve two-year terms and following a one-term break in service may be reappointed. Terms are staggered in order to provide continuity and efficient committee functioning.
	+ The Vice President of Student Affairs will identify administrative staff members to fill two (2) staff positions on the committee. Staff members will serve two-year terms and following a one-term break may be reappointed.
	+ SFAB is chaired by the Associate Vice President of Student Affairs. The chair will maintain records of all committee actions, work with the Budget Office to monitor compliance with all policies and procedural requirements associated with Mandatory Fees, advise the SFAB on these matters; and work with the CSU Budget Office to implement the procedures related to the Mandatory Fee s on campus.
	+ Term of service is July 1-June 30 annually or bi-annually.
1. Any other information or comments? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

**Course Fee Communication Survey**

Please complete this short survey on communications that are sent out regarding course fees:

1. Do we send any notice of the upcoming course fee meeting to:
2. Any members of the student body? Currently No (except we do send to SGA to ask for committee members). We can add this to our process.
3. Any faculty or staff other than the fee holders? Currently No, but can add to faculty senate and administrative council.
4. Any notices of upcoming meetings in

Laker Lines Currently NO, but can add this.

Email Yes to fee holders and committee members (including SGA president), but no others.

Newspaper NO

Faculty Senate NO, but can add this.

Admin Council No, but can add this.

Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.

1. If we do communicate with others

Who\_Deans council (to share with Dept. Chairs) and fee holders.

When\_Before meetings occur.

How\_\_\_email\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Frequency Once\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. Once the meeting is over and the votes concluded, do you send any information of the outcome to anyone other than the course fee members, the Provost and VP for Business Operations? (I know info is sent to Bursar if approved for billing to students). If yes, (List the names and info sent): Results are sent to Dean’s council, Corlis Cummings (who posts it on the Fee Website) and to the Bursar.
2. Do you send the website information to any campus stakeholders or campus members? \_Currently no, but we can do this.
3. How do we select course fee committee members? – I ask each department that charges a fee to designate someone to represent them on the committee, I asked the SGA President for 2 – 3 names (they often just come themselves and do not ask anyone, I ask for a rep from the business office (has always been Scott M.). I think we need to find a way to add more faculty member to the committee who are not fee holders. The fee holders have always done well because they generally are the most familiar with the rules, but some external input would be good.
4. Any other information or comments? The fact that we have not increased course fees for 2 – 3 years is pretty good evidence that we are resisting the tide for fees to creep upwards. But, I think we can improve the system by adding more non-fee holding members, getting more students to attend, and sending out pre and post meeting announcements.

**Mandatory Fee Purpose, Use, and Decision-making Interview Protocol**

1. What are the purposes and uses of the Mandatory Fee? Have these changed over the last 5 years and if so, how?
2. What constraints are there related to the mandatory fee based on BOR policies and guidelines?
3. How are decisions made about how to expend the fee each year?
4. The Student Fees Advisory Board (SFAB) recommends/approves the broad parameters of each Mandatory Fee budget. Who decides and approves the details of how the budget is spent within each broad category? What assumptions are used to guide those decisions? Who has input into the process for making those decisions?
5. What changes would you recommend to make the process for decision-making related to the Mandatory Fee more transparent AND for communicating with the campus community?

<https://www.clayton.edu/Portals/535/docs/StudentOrganizations/Fall14/Business_Policy_>Manual\_FY15\_1.pdf

**APPENDIX #7**

**Recommended Templates and Forms**

1. **Template for Mandatory Fees**
2. **Template for Special Course Fees**
3. **Template for Miscellaneous Fees**
4. **Template for Updated Webpage Design**
5. **Template for Power Points**

Clayton State University

Suggested items for template for Mandatory Fee Form

Fiscal Year \_\_\_\_\_\_

Name of Fee:

Fee Type:

Office Responsible for Fee:

Amount of fee:

Basis (per term, one time, etc.):

Purpose of the fee (explain benefit to student or education):

Explain use of the fee including major items funded by the fee:

Revenue in FY \_\_\_:

Expenditures in FY \_\_\_:

Net Operating Gain (Loss) in FY \_\_\_:

Reserve amount and suggested use:

Point of Contact for questions:

 Name:

Phone:

 E-mail:

For more information on how this fee is used and related financial data, please go to:

Annual Review of Fee Usage.

Form Submitted By:­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VP/Dean/Director

Clayton State University

Suggested items for template for Course Fee Form

Fiscal Year \_\_\_\_\_\_

Name of Fee:

Fee Type:

Office Responsible for Fee:

Amount of fee:

Basis (per term, one time, etc.):

Purpose of the fee (explain benefit to student or education):

Explain use of the fee, including major items funded by the fee:

Revenue in FY \_\_\_:

Expenditures in FY \_\_\_:

Surplus amount and suggested use:

Point of Contact for questions:

 Name:

Phone:

 E-mail:

For more information on how this fee is used and related financial data, please go to:

Annual Review of Fee Usage.

Form Submitted By:­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VP/Dean/Director

Clayton State University

Suggested items for template for Miscellaneous Fee Form

Fiscal Year \_\_\_\_\_\_

Name of Fee:

Fee Type:

Office Responsible for Fee:

Amount of fee:

Basis (per term, one time, etc.):

Purpose of the fee (explain need or benefit for operations/student):

Explain use of the fee including major items funded by the fee:

Revenue in FY \_\_\_:

Expenditures in FY \_\_\_:

Surplus amount and suggested use:

Point of Contact for questions:

 Name:

Phone:

 E-mail:

For more information on how this fee is used and related financial data, please go to:

Annual Review of Fee Usage.

Form Submitted By:­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­­\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

VP/Dean/Director

****

**Proposed PowerPoint Outline for SFAB Presentations**

1. No fee increase being requested:
	1. Purpose of fee
		1. Department functions (if appropriate)
		2. Services funded by fee
	2. Current fee
	3. Details of how fee is used
	4. Financials
		1. Budget and fee history and trends for up to 3 years max
		2. Reserve balance at start of current fiscal year
		3. Purpose and anticipated usage of reserve balance
		4. Anticipated budget changes for upcoming fiscal year
2. Increase in fee being requested:
	1. Purpose of fee
		1. Department functions (if appropriate)
		2. Services funded by fee
	2. Current fee & proposed increase
	3. Details of how fee is used
	4. Financials
		1. Budget and fee history, 3 years minimum
		2. Reserve balance at start of current fiscal year
		3. Purpose and anticipated usage of reserve balance
		4. Anticipated budget changes for upcoming fiscal year
	5. What would fee increase help provide
	6. Consequences if fee increase is not approved

**Proposed PowerPoint Outline for Supplemental Course Material Fees/Special Charges/Elective/Miscellaneous Fee Presentations**

1. No fee/charge increase being requested:
	1. Purpose of fee/charge
		1. Department functions (if appropriate)
		2. Services funded by fee/charge
	2. Current fee
	3. Details of how fee/charge is used
	4. Financials
		1. Budget and fee/charge history and trends for up to 3 years max
		2. Reserve balance at start of current fiscal year
		3. Purpose and anticipated usage of reserve balance
		4. Anticipated budget changes for upcoming fiscal year
2. Increase in fee/charge being requested:
	1. Purpose of fee/charge
		1. Department functions (if appropriate)
		2. Services funded by fee/charge
	2. Current fee/charge & proposed increase
	3. Details of how fee/charge is used
	4. Financials
		1. Budget and fee/charge history, 3 years minimum
		2. Reserve balance at start of current fiscal year
		3. Purpose and anticipated usage of reserve balance
		4. Anticipated budget changes for upcoming fiscal year
	5. What would fee/charge increase help provide
	6. Consequences if fee/charge increase is not approved
3. Request to create a new fee/charge:
	1. Purpose of fee/charge
		1. Explain the need and how it will benefit students
		2. Detail the services or activities that are proposed to be funded by fee/charge
		3. Explain the Department functions (if appropriate)
	2. Amount of the proposed fee/charge
	3. Details of how the proposed fee/charge will be used
	4. Financials
		1. Explain how those services or costs or needs are currently met (if applicable), 3 years history minimum
		2. Spending Plan
		3. Reserve creation- include purpose and anticipated usage of reserve balance
	5. What would fee/charge help provide
	6. Consequences if fee/charge is not approved

**APPENDIX #8**

**Clayton State University and University System of Georgia Miscellaneous Fee Research**

The information in the attached table was extracted from USG institutional web sites. Unless specifically indicated, the fee amounts are for undergraduate students who are residents of the State of Georgia and taking a full load.

Some observations:

* Fee information is relatively difficult to find at the majority of the institutions. The existence of a single web page that contains all fee data is relatively infrequent. Clayton State does a good job of identifying all its fees in one place.
* There does not seem to be a single common location at USG institutions to find fee data or even links to it. While the Bursar's Offices are a good starting point, parts of the overall fee information are often found at Admissions sites, in the Schedule of Classes, or in Academic Catalogs.
* In several cases, no information beyond Mandatory Fee s could be located.
* I have included parking fees in the Mandatory section for comparative purposes. Clayton State lists Parking/Public Safety as a Mandatory Fee; most other USG institutions do not.
* There is considerable variation between State Universities even among the Mandatory Fees. Clayton State is below the mean of the total Mandatory Fee for the State Universities.
* The mix of Additional Fees varies considerably both in purpose and in amount. Where common purposes can be found, Clayton State fees are generally lower than those of the other State Universities.
* There are some interesting fee types at other institutions that could make sense at Clayton State.

Miscellaneous Fee Comparison: The comparison shows that the various institutions have different Miscellaneous Fee types in many cases:

* Some, including Clayton State University, have a Late Registration Fee; others have Late Payment Fees which may serve the same function; and others have both Late Registration and Late Payment Fees.
* Only two have Reinstatement Fees.
* Only two have Enrollment Management Fees (Clayton State is one of the two).
* Three have Late Graduation Fees to address the problem of late submittal of graduation applications.
* Virtually all have Returned Check, Orientation, Graduation, Transcript, and Graduation Application Fees. Orientation Fees often have variation within an institution based upon the type and extent. The Orientation Fee shown in Table 1 is based upon a transfer student without guests. In some cases, fees are expressed in a per-course or a per-credit hour basis. In such cases for comparison purposes, the fees are shown for four (4) courses

or twelve (12) credit hours.

* In cases where no fee information is shown in Table 1, the fee may not exist or the fee may not be included in web-based materials. If a fee is known to be zero ($0), it is stated as such (for example, the Transcript Fee at some institutions). Mean fee values in Table 1 include only those institutions for which a fee amount could be determined.

Comparison of Clayton State University Miscellaneous Fees with other USG State Universities leads to the following general conclusions for those fees most frequently reported:

* If Late Registration and Late Payment Fees are considered together, Clayton State falls slightly above the mean of the State Universities ($100 versus $91).
* The Returned Check Fee at Clayton State is slightly higher than the mean of the State Universities ($30 versus $26).
* The Orientation Fee for transfer students without guests at Clayton State is considerably lower than the mean of State Universities ($45 versus $78).
* The Graduate School Application Fee at Clayton State is slightly higher than the mean of the State Universities ($50 versus $43).
* The Graduation Fee at Clayton State is considerably lower than the mean of the State Universities ($35 versus $50).
* The Transcript Fee at Clayton State is slightly higher than the mean of the State Universities ($5 versus $3).
* The Undergraduate Application Fee at Clayton State is somewhat higher than the mean of the State Universities ($40 versus $33).

Table 1 