



## 11.2.5.7.3 Mandatory Student Fees

### Policy Statement

Pursuant to the policies of the University System of Georgia, The University of Georgia shall prepare an operating budget for educational and general activities and an operating budget for auxiliary enterprises for the institution for each fiscal year within the limit of funds allocated plus estimated internal income of the institution.

### Reason for policy

The University of Georgia budget is designed as a comprehensive fiscal plan for implementing its mission as a land-grant and sea-grant university with statewide commitments and responsibilities, as the state's oldest, most comprehensive, and most diversified institution of higher education. Our motto, "to teach, to serve, and to inquire into the nature of things," reflects the University's integral and unique role in the conservation and enhancement of the state's and nation's intellectual, cultural, and environmental heritage. The implied values of the budget as a comprehensive fiscal plan for the institution include accountability, efficiency and efficacy.

### Procedures

**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. Mandatory fees shall include, but not be limited to:

1. Intercollegiate athletic fees;
2. Student health service fees;
3. Transportation or parking fees;
4. Student activity fees;
5. Technology fees;
6. Facility fees.

All mandatory fees shall be approved by the Board of Regents at its meeting in April to become effective the following fall semester. All mandatory student fees collected by the university shall be budgeted and administered using proper administrative procedures. All payments from funds supported by student mandatory fees shall be made according to approved business procedures and the appropriate business practices of the university.

The Board of Regents mandatory student fee request procedure requires the university to submit fee requests in January of each year. Mandatory fee requests to the Board of Regents must include the following:

1. Summary of fee requests including revenue and HOPE impact;
2. Detailed revenue projections for each mandatory fee;
3. Financial data form with actual and projected revenues and expenditures;
4. Mandatory student fee participation form.

The Budget Office will disseminate specific instructions and forms to the appropriate university units when received from the Board of Regents, historically in October. The deadline for university units to submit mandatory fee requests to the Office of the Vice President for Finance and Administration is mid-November. If approved by the Board of Regents, fee increases will take effect the following Fall Semester.

**Procedure for Mandatory Student Fee Increase Request:** The annual mandatory student fee request process is initiated when the Vice President for Finance & administration receives specific fee request instructions and forms from the Board of Regents. These instructions and forms are generally received in October and distributed by the Budget Office to university units. They are due back to the Office of the Vice President for Finance and Administration in December. The submission date for mandatory fee increase requests to the Board of Regents is January.

To obtain Board of Regents approval for a mandatory student fee increase, the following detailed information must be submitted through the UGA Office of the Vice President for Instruction:

1. List of all fees currently charged;
2. Narrative description of the fee request providing a justification for the increase;
3. Completed Mandatory Student Fee Participation Form for each request for a new fee or an increase to a current mandatory student fee, and a budget for a current mandatory student fee;
4. Completed Detail of Revenue Projection form for each applicable fee that will be assessed for that fiscal year, whether an increase is being requested or not;
5. Financial Data form for all fees being charged, regardless of whether an increase is being requested for that fee or not.

If an increase is being requested for that fee, include the following information:

1. Any salary increase requested, including current personal services dollars;
2. Any inflationary increase expressed in percent increases and total funds. Also include a justification in narrative form.
3. Include both current and projected reserve balances and their intended uses.
4. Document any increase related to a change in service provider or contractual arrangement.
5. A completed Pro-Forma Financial Statement for Payback Projects. A worksheet and instructions will be furnished to assist in completion of this statement.
6. A completed Summary of Mandatory Fees Request form. This form includes a summary of mandatory fee increase requests, and a listing of reserves and fund balances.

All forms and spreadsheets will be available online through the Board of Regents Budget ListServe.

Please reference the links to the USG Business Procedures Manual and USG Policy Manual (under the Related Information section of this policy) for further information regarding mandatory student fees.

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## Responsibilities

Responsible University Senior Administrator: Vice President for Finance & Administration

Responsible University Administrator: Associate Vice President - Finance Division

Policy Owner: University Budget Office

Policy Contact: Ken McCollum

Phone Number: 706-542-2802

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## Record Retention

**Citation or Reference:** [Annual Budget Records](#)

**Number:** 0472-03-004

This series documents the annual institutional budget provided for inclusion in its Annual Adopted Operating Budget book. This series includes: operating budget expense by categories and functions report; estimated gifts, grants, contracts and clearing account summary report; student fee income and application of funds report; statewide public service source and application of funds; other reports specified by the Chancellor's Office; and institutional budget preparation instructions.

**Retention:** Annual operating budget: PERMANENT; All other records: 7 years.

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#### Related information

[USG Business Procedures Manual 8.3.2: Mandatory Fees](#)

[USG Policy Manual 7.3.2.1: Mandatory Student Fees](#)

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#### Policy Dates

Effective Date:

Date Last Updated: 02/17/2017

Date of Last Review:

Date of Approval:

Previous Version of Policy: