



**Submission of Proposal for New or Existing Fees**

(refer to Policy AD15)

Unit Requesting Fee(s): \_\_\_\_\_

Brief Description of Fee(s): \_\_\_\_\_

Account to which fee income will be credited: \_\_\_\_\_ Admin Area Number: \_\_\_\_\_

Request is for a:  NEW FEE(s)  
 Revision of EXISTING FEE(s) (  Increase or  Decrease or  Delete)

Who are the customers who will be charged the fee(s)?

Internal:  University Departments  Students  Faculty/Staff  Other (Explain)  
 External:  Not-for-Profit Organizations  For-Profit Organizations  General Public  
 Government Entities (including charges to governmental grants or contracts)

Provide a detailed explanation for:

- New Fees: Why is a new fee required?
- Existing Fees: Why is the rate changing?

**NOTE: This form can be used to submit multiple fees. If the schedule mixes new and existing fees, or audiences, the distinction as to new or existing fees and what audiences will be charged the fees should be detailed on the schedule.**

Attach a schedule showing:

- For New Fees: A detailed explanation of how the fee was derived, including fringe and overhead if applicable. If any "profit" is included in the fee, explain. Include detail on waivers/discounts and those authorized to grant.
- For Existing Fees: A comparison of the current rate, the proposed rate and the increase/decrease amount and percentage. An explanation is needed for any increases or decreases over 4%. Include detail on waivers/discounts and those authorized to grant.

**NOTE:** If different customers will be charged different fees, clearly delineate in the schedule what fee will be charged each customer. If an existing fee will be charged to a new type of customer (i.e. external), this should be clearly outlined in the schedule.

**IF EXTERNAL CUSTOMERS WILL BE CHARGED THE FEE(S), THE FOLLOWING MUST BE SUBMITTED:**

**NEW FEE:**

- 1) Provide an explanation as to why Penn State should provide this service to external customers?
- 2) Provide an estimate of the expected revenue from sales to external customers during the next 12 months including what percentage sales to external customers will be to total expected revenue:
- 3) Attach a schedule that shows a comparison of the proposed fees with other similar entities providing the same service. Include detail on what type of benchmarking was done with other entities to derive the fees.
- 4) Is the fee for external customers based on full costing, including application of fringe and overhead? If fringe and overhead are not applied, provide an explanation:

**EXISTING FEE(S):**

- 1) Has this fee been charged to external customers in the past? If not, please provide all the information requested under NEW FEE.
- 2) Has there been any change in similar entities offering this service (i.e. have any new businesses offering this service opened, or existing businesses closed)?  YES  NO. If yes, provide explanation:

**Must be approved by the following before submission to Corporate Controller's Office for final approval:**

\_\_\_\_\_  
**Budget Administrator                      Date                      Budget Executive                      Date                      Financial Officer                      Date**

To Be Completed by Corporate Controller's Office:  
**Approved:** \_\_\_\_\_ **Date:** \_\_\_\_\_