**INSTRUCTIONS FOR ACTIVITY REQUEST FORM**

**UNIVERSITY OF WEST FLORIDA**

Directions: The form is fillable online; click on the blue boxes with your mouse.

Line # 1. The title of the fund can be no longer than 35 characters, including spaces.

Line # 5. Explain in as much detail as possible what this particular fund will be used for. Please address this particular fund, not the whole department. (Please see the bottom of this page for some examples of mission statements.)

Line # 6. UWF’s mission is focused on instruction, research, or public service.

Line # 11. Please note: E&G resources cannot be used for Auxiliary activities. If an E&G-paid employee is used to do the auxiliary work, their salary must be prorated between the E&G duty and the auxiliary work.

Line # 12. List all expenditures, including salary and administrative overhead. (Please refer to the Expenditure Guidelines regarding the appropriate types of expenditures for each fund type.)

Line # 14. A back-up fund must be provided before the fund can be approved.

EXAMPLES OF MISSION STATEMENTS

To promote and recruit students for the College Student Personnel Administration program and graduate assistants for the Division of Student Affairs. (Fund 130108.)

To deposit guest fees for parents/others attending Orientation program with their new student. (Fund 130074.)

To receive residual distributions for the Ford PAS training programs/events. (Fund 130844.)

To handle the cost for orientation of new and transfer students for items other than registration fees. The cost is for specific items: food, lodging, survey for statistical assessment, and books used for the Common Read program. (Fund 130075.)

**ACTIVITY Request FORM**

**University of West Florida**

1. Name of Proposed Activity:

2. Sponsoring Unit / Financial Manager:

3. Initiator / Title / Phone #:

4. Business Manager / Phone #:

5. What is the purpose/mission of this particular fund?

6. To assist us in determining tax consequences, please explain how this specific activity supports the mission of

 the University of West Florida.

7. Activity Beginning Date: Ending Date (if one-time activity):

8. Location of Activity:

9. Other Support: List if there is any other support from other funding sources. For what?

10. Will this activity include the providing of food or lodging?

11. Specify in detail the different types of revenue you expect to receive in this fund. (Please attach additional sheets if necessary.)

 a.

 b.

 c.

 d.

 e.

12. What types of expenditures do you anticipate in the operation of this fund? All expenditures should support the activity’s purpose. (Please attach additional sheets if necessary.)

 a.

 b.

 c.

 d.

 e.

13. What percentage of the work activities involved in this fund will be performed by the following groups?

UWF employees %

UWF students %

Volunteers %

Others (specify) %

 14. **Cash deficits are not allowed.** If additional money is needed to cover expenditures, what fund will it come

 from? **(E&G is not allowed, and the back-up fund must have available revenue.)**

 Banner Fund #: Title:

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**Please note:** An administrative overhead fee will be charged to auxiliaries according to the rates specified on the attached chart. This fund will also be responsible for sales tax, unrelated business income tax (UBIT), and other taxes that result from the conduct of this activity.

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(Requester Signature and Date)

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(Financial Manager Signature and Date)

I approve of the above activity and agree to be responsible for its funding.

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

(Dean or Vice-President Signature and Date)

**Please send signed, original copy to Controller’s Office, Bldg 20-E, Room 108.**

**ADMINISTRATIVE OVERHEAD RATE CHART**

**Administrative overhead rate changes begin on July 1 of each fiscal year as follows:**

**FY 2012-13 3.71%.** Assessed on actual **disbursements** for salary, OPS, and expenditures.

**FY 2013-14 4.71%.** Assessed on **revenues**.

**FY 2014-15 5.71%.** Assessed on **revenues**.

**FY 2015-16 6.71%.** Assessed on **revenues**.

**FY 2016-17 6.71%.** Assessed on **revenues**.

**FY 2017-18 6.71%.** Assessed on **revenues**.

**FY 2018-19 6.71%.** Assessed on **revenues**.

**FY 2019-20 6.71%.** Assessed on **revenues.**

**FY 2020-21 6.71%.** Assessed on **revenues.**

**The overhead rate will roll forward to future fiscal years, unless stated on this form.**