Concordia SAE Fee Levy Policy
Enacted February 18th, 2024

Version 1.0

Preamble: The Concordia SAE Fee Levy was created in order to come up with a solution to providing more support to Concordia SAE so that they may continue operations and represent Concordia at an increasingly higher level.

Revision History

Version	Description	Author(s)	Adoption
1.0	Initial Version	Ziad Kabbani (President), Berk Yurteri (VP Finance), Matthew Parthimos (VP Safety & Facilities), Jason Zalass (VP IT), James Savelson (VP External), Peter Hopkins (VP Manufacturing), Samir Allouch (Coordinator – Aeroconnect), Jérémy Lampron (Coordinator – Aerodesign), Andrzej Fedorowicz (Coordinator – Baja), Austin Unruh (Coordinator – Formula).	February 18th, 2024

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1. Definitions

1.a. **Gina Cody School of Engineering & Computer Science** (hereinafter referred to as "GCS") is the faculty at Concordia University that offers undergraduate and graduate programs in engineering and computer science.

1.b. The **Council** is the administrative board of Concordia SAE, composed of members as defined by the Concordia SAE Constitution.

1.c. The **Fee Levy Breakdown Committee** (hereinafter referred to as "**FLBC**") is a committee of Concordia SAE that administers the Concordia SAE Society Fee Levy.

1.d. **Member** refers to the Concordia SAE members.

1.e. **VP** is an abbreviation meaning Vice-President.

1.f. **Subdivision** refers to the teams managed by a Coordinator as outlined by the Concordia SAE Constitution

2. Purpose

2.a. The Concordia SAE fee levy is designated to financially back Concordia SAE in both it's projects and operations.

2.b. This policy governs the organization and breakdown of the fee levy dedicated to Concordia SAE

3. Scope

3.a. This policy applies to all subdivisions of Concordia SAE as well as Council members.

4. Composition of the FLBC

4.a. President of Concordia SAE

4.b. Vice-President of Concordia SAE

4.c. Vice-President HR & Advancement of Concordia SAE

4.d. Vice-President of Finance of Concordia SAE

4.e. Vice-President of Facilities of Concordia SAE

4.f. Vice President of IT of Concordia SAE

4.g. Vice-President of Manufacturing

4.h. Business Coordinator of Concordia SAE

5. Administration

5.a. Appointment of the FLBC

5.a.i. FLBC is automatically appointed as the results for the Council elections come in.

5.a.ii. If any position remains unfilled for any reason, then the FLBC proceeds as usual, ignoring said position for quorum fulfillment.

5.b. Claiming instructions

5.b.i. After the approval of the breakdown by the FLBC, the subdivisions will be informed of the totality of the breakdown and results will be also announced at the General Assembly

5.b.ii. The fee levy can be claimed as per the regular SAE financial operations

6. Fee Levy Breakdown Process

6.a. Finance, Facilities, Manufacturing, IT, Business:

6.a.i. VP Finance, VP Facilities, VP Manufacturing, VP IT and the Business Coordinator (with VP HR if applicable) present the society's needs and responsibilities on all five fronts

6.a.ii. A maximum of 25% of the total fee levy is to be allocated to these five at the discretion of the FLBC

6.a.iii. Exceptions can be made for big purchases. Examples include but are not limited to:

6.a.iii.1. Society Vehicles

6.a.iii.2. Machining Equipment

6.a.iii.3. Anything to cover governmental, legal issues

6.b. Emergency Funds:

6.b.i. Designed to cover surprise costs to be dealt with urgently throughout the year

6.b.ii. A maximum of 10% of the total fee levy is to be allocated to this at the discretion of the FLBC

6.b.iii. If by June 30th the funds have not been spent, they are to be allocated to the subdivisions based on %amounts determined by section 6e of this policy

6.c. Subdivision Application Process:

6.c.i. NOT open to the Business Team due to section 6a

6.c.ii. Yearly Application

6.c.iii. Subdivisions are required to apply every year in the following window March 11th – March 24th

6.d. Application Contents

6.d.i. Budget proposal:

6.d.i.1. Detailed realistic budget including any and all current funding sources.

6.d.i.2. Spanning May 1st of the current calendar year to April 30th of the next calendar year

6.d.i.3. Showing expected versus actual expenditures of last year's budget (actual as up to date as possible + outstanding projected)

6.d.i.4. Sponsorship Package

6.d.i.5. List of previous year's sponsors including the associated funding or monetary equivalents to the services or products offered

6.d.i.6. May include previous prototype closeout

6.d.ii. Written plan for the academic year that may include closing out the outstanding project/competition, scheduling (broad terms not minute project deadlines), recruitment, or promotional ideas in the application document.

6.d.iii. A document detailing:

6.d.iii.1. Previous Year's accomplishments/milestones achieved

6.d.iii.2. Up to date active member list

6.d.iv. Applications must be submitted to the VP Internal

6.d.v. In cases where the Vice President is unavailable for any reason, applications must be submitted to the VP Finance

6.e. Subdivision fund breakdown:

6.e.i. An initial breakdown meeting is to be held within 2 weeks after the application period closes

6.e.ii. The Applications outlined in 6.d are to be used for reference and are not the deciding factor on how the funds are spread around

6.e.iii. Fund breakdown every semester follows a %-based template established during the initial Breakdown meeting using an estimate fee levy amount for the year

6.e.iv. Funds are to be allocated every semester at the discretion of the FLBC following a vote done during the Breakdown meeting

7. Responsibilities of the FLBC members

7.a. The FLBC shall coordinate the expenditure of the Concordia SAE Society Fee Levy Funds in such a manner that it most benefits the society.

7.b. The President of Concordia SAE shall:

7.b.i. Chair the Fee Levy Breakdown meetings;

7.b.ii. Set and distribute the agenda and all relevant documents for the FLBC meetings and inform all members of the dates and times for these meetings.

7.c. The VP Internal shall:

7.c.i. Coordinate applications with the Subdivisions;

7.c.ii. Provide an application form that shall be made available to applicants no later than two (2) weeks prior to the application period opening.

7.c.iii. Notify Subdivisions of the final breakdown

7.d. The VP Finance shall:

7.d.i. Oversee the financial management of the funds;

7.d.ii. Determine the total amount available for disbursement every semester;

7.d.iii. Take over VP Internal responsibilities when needed

7.e. The VP Facilities, VP IT, Business Coordinator, and VP HR (joined with Business if applicable) shall:

7.e.i. Gather information regarding their respective expenditures and potential growth opportunities;

7.f. The FLBC is set to meet as soon as possible following the closure of the application period, then once again per following semester in order to breakdown the funds as they come in, as well as at any time during the year when necessary

7.f.i. A two-thirds (2/3) majority presence is required for a FLBC meeting to be held.

7.f.ii. A two-thirds (2/3) majority vote of officers present is required for a FLBC motion to pass.

8. General Provisions

8.a. If a Subdivision is found to be spending money received from the fee levy for uses not relevant to their operations, the funding for the money granted will be revoked at the discretion of the FLBC.

8.b. If an officer does not use all their allocated funds by the academic withdrawal deadline of the next academic year's fall semester, the remainder of the grant is moved to the Facilities budget. If it remains unspent it is carried over to the next year as part of the Savings Account outlined in Section 9

9. Savings

9.a. General Savings

9.a.i. Savings Account has a target amount of: 40,000CAD , if that amount is exceeded the funds will be dealt with in accordance with section 9.a.ii.

9.a.ii. Based on Section 8.b. unspent funds can be dealt with according to the FLBC's decisions. It can either:

9.a.ii.1. Be deposited into a Savings account for purposes to be determined

9.a.ii.2. Or redistributed the next year among the officers' budgets

9.b. Savings Plan

9.b.i. Officers can submit proposals to Council for savings plans spanning longer than a year. Funds going to said savings plans are considered separate from the savings account.

10. Fee levy Opt-Out

10.a. The fee levy is to be made opt-out-able. The opt-out period is from the beginning of each semester till Concordia's deadline for withdrawal with tuition refund (DNE).