February 25, 2000

MEMORANDUM

TO: Chief Executive Officers of Member and Candidate Institutions

FROM: James T. Rogers, Executive Director, Commission on Colleges

RE: Institutional Profile for Financial Information

Enclosed please find the Winter 2000 Institutional Profile for Financial Information (Financial Profile). We would appreciate your completing and returning it to the Commission office by March 24, 2000. Please use financial information based on your most recently completed financial year and indicate on the form the beginning and ending date of that financial year.

You will note that the financial information requested on the Commission's form is exactly the same as that requested in Parts A, B, and E of the 1999 Integrated Postsecondary Education Data System Finance Survey (IPEDS) that was due to the U.S. Department of Education by February 22, 2000. Therefore, in addition to sending the Commission's completed form, we also would appreciate your attaching copies of IPEDS Finance Survey Parts A, B, and E as completed in February. (If your institution's financial information is part of a system financial statement, please forward a computer copy of the information requested in Parts A, B, and E above.) Please note that financial information supplied on the Commission's Financial Profile must include expenses/revenues of all campus operations, including those related to branch campuses and off-campus activities/programs/sites.

Before submitting your Financial Profile, please ensure that all items listed on page four have been completed and that you, as chief executive officer, and your finance officer certify that all information is accurate.

Should you have any questions regarding the enclosed Profile, please contact Mr. Steve Whittington at 404/679-4501 ext. 532. We appreciate your prompt attention to this matter.
Instructions (Public Institutions)

Please follow the instructions below for completing each of the line items on pages 3 and 4 of this document.
(Instructions on front and back)

Line 0 - Total Revenues – (Refer to institution’s completed IPEDS, Part A, line 16, column 3 for the total.) Total income from tuition and fees, government appropriations (from any level), government grants and contracts, private grants and contracts, endowment income, sales and services of educational activities, auxiliary enterprises, hospitals, independent operations, and any other source of income/revenue.

Line 01 - Instruction – (Refer to institution’s completed IPEDS, Part B, line 01, column 3 for the total.) Total expenses of instructional units (colleges, schools, departments, divisions) and expenses for departmental research and public service not separately budgeted. Include expenditures for both credit and noncredit activities. Exclude expenditures for academic administration where the primary function is administration. Include general academic instruction, occupational and vocational instruction, special session instruction, community education, preparatory and adult basic education, and remedial and tutorial instruction conducted by the institution’s teaching faculty.

Line 02 - Research – (Refer to institution’s completed IPEDS, Part B, line 02, column 3 for the total.) Total funds expended for activities specifically organized to produce research outcomes and commissioned by an agency either external to the institution or separately budgeted by an organizational unit within the institution. Does not include nonresearch sponsored programs.

Line 03 - Public Service – (Refer to institution’s completed IPEDS, Part B, line 03, column 3 for the total.) Total funds budgeted specifically for public service and expended for activities established primarily to provide non-instructional services beneficial to groups external to the institution. Include expenses for community services and cooperative extension services.

Line 04 - Academic Support – (Refer to institution’s completed IPEDS, Part B, line 04, column 3 for the total.) Total expenses for the support services integral to the primary mission of instruction, research, or public service. (Support services include the library, audio-visual services, academic computing support, academic administration, ancillary support, personnel development, galleries, museums, and course and curriculum development.) Include veterinary and dental clinic expenses if their primary purpose is to support the institution’s mission.

Line 05 - Library Expenses – (Refer to institution’s completed IPEDS, Part B, line 05, column 3 for the total.) Total of all library expenses, including all libraries at the institution. (Include line 05 expenditures in line 04 total for academic support.)

Line 5a - Library Acquisitions – (Breakout of these expenses is not requested on the IPEDS form) Total expenditures for collection acquisition for all libraries at the institution. Include expenses for all library materials, regardless of fund source, such as books, periodicals, microforms, video/audio tapes etc., and also subscription/access fees for electronically accessed databases and information services. Do not include any type of hardware purchases. (Include line 5a expenditures in line 04 total for academic support.)

Line 06 - Student Services – (Refer to institution’s completed IPEDS, Part B, line 06, column 3 for the total.) Total funds expended for admissions, registrar activities, and activities that contribute to students’ emotional and physical well-being and to their intellectual, cultural, and social development outside the context of the formal instructional program. Include the administrative allowance for Pell Grants.

Line 07 - Institutional Support – (Refer to institution’s completed IPEDS, Part B, line 07, column 3 for the total.) Total expenses for daily operational support of the institution (excluding expenses for physical plant operations). Include expenditures for general administrative services, executive direction and planning, legal and fiscal operations, and public relations/development.

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Line 08 - Operation and Maintenance of Plant – (Refer to institution’s completed IPEDS, Part B, line 08, column 3 for the total.) Total expenses for operations established to provide service and maintenance for grounds and facilities used for educational and general purposes. Include expenses for utilities, fire protection, property insurance, and similar items. Do not include expenditures made from the institutional plant funds account.

Line 09 - Scholarships and fellowships – (Refer to institution’s completed IPEDS, Part B, line 09, column 3 for the total. Complete Part E before filling out Part B, as the total on line 09 of Part B should match line 07, column 3 of Part E.) Total expenses given in the form of outright grants and trainee stipends to individuals enrolled in formal course work, either for credit or noncredit. Aid to students in the form of tuition or fee remissions should be included. (Exclude those remissions that are granted because of faculty or staff status. Charge these to staff benefits.) Do not report College Work Study program expenses — report those expenses where the student worked. Include Pell Grants. Do not include expenditures for Federal Direct Student Loan (FDSL) Program.

Line 10 - Total Educational and General Expenditures (E&G) – Total of lines 01-04 and 06-09.

Line 11 - Mandatory transfers – (Refer to institution’s completed IPEDS, Part B, line 10, column 3 for the total.) Total transfers from current funds required to fulfill a binding legal obligation of the institution. Include mandatory debt-service provisions relating to academic and administrative buildings, including amounts set aside for debt retirement and interest and required provisions for renewal and replacements to the extent not financed by other sources. Include the institution’s matching portion of Perkins Loans when the source of the funds is current revenue. Do not report transfers into the current fund (i.e., negative numbers).

Line 12 - Non-mandatory transfers – (Refer to institution’s completed IPEDS, Part B, line 11, column 3 for the total.) Total transfers from current funds to other fund groups made at the discretion of the governing board to serve a variety of objectives, such as additions to loan funds, funds functioning as endowment, general or specific plant additions, voluntary renewals and replacement of additions, voluntary renewals and replacement of plant, and prepayments on debt principal.

Line 13 - Total Educational and General Expenditures and Transfers (E&G) – Total of lines 10 through 12.

Line 14 - Auxiliary enterprises – (Refer to institution’s completed IPEDS, Part B. The sum of column 3 for lines 13, 14, and 15.) Total expenses of self supporting operations (or nearly so) that service students, faculty or staff and that charge a fee for such service. Examples are food services, residence halls, health services, intercollegiate athletics, college unions and stores. This figure must include mandatory and non-mandatory transfers.

Line 15 - Hospitals – (Refer to institution’s completed IPEDS, Part B. The sum of column 3 for lines 16, 17, and 18.) Total expenses of all hospital operations, including nursing expenses, other professional services, general services, administrative services, fiscal services, and charges for physical plant operations. If the institution accounts for depreciation under FASB Standard No. 93, such depreciation should be accounted for. This figure must include mandatory and non-mandatory transfers.

Line 16 - Independent operations – (Refer to institution’s completed IPEDS, Part B. The sum of column 3 for lines 19, 20, and 21.) Total expenses for operations independent or unrelated to the primary missions of the institution although they may contribute indirectly to the enhancement of these programs. This category is generally limited to expenditures of major federally funded research and development centers. Do not include the expenditures of operations owned and managed as investments of the institution’s endowment funds. This figure must include mandatory and non-mandatory transfers.

Line 17 - Total expenditures and transfers – (Refer to institution’s completed IPEDS, Part B, line 22, column 3.) Sum of lines 13 through 16.
General Instructions

Please complete the Commission's Institutional Profile for Financial Information (Financial Profile) using data supplied on your Integrated Postsecondary Education Data System Finance Form 1999 (IPEDS) which was due to the U.S. Department of Education on February 22, 2000. It is extremely important that you follow the Commission's directions on pages 5-6 when transferring the data from the IPEDS form to the Commission's form. Financial information should include all campus operations, branch campuses, and off-campus programs.

All institutions that participate or are applicants for participation in any Federal financial assistance program authorized by Title IV of the Higher Education Act of 1965, as amended, are required by the U.S. Department of Education to complete the IPEDS survey in a "timely and accurate manner." For those institutions not required to complete the survey on the basis of the above requirements, the completion of the IPEDS survey is voluntary; however, these institutions must complete the Commission's Financial Profile using the directions on pages 5-6.

Before completing the Winter 2000 Profile, please

☐ carefully read all directions
☐ make a copy of this form
☐ assign completion of the form to your institution's finance officer

Before returning the completed Winter 2000 Profile, please

☐ review page 4 of this document to ensure that checklists are complete
☐ return this completed form with the institution's completed 1999 IPEDS Finance Survey which was due February 22, 2000. Thank you for your prompt attention.

Please direct all questions to Steve Whittington at (404) 679-4501, ext. 532.

80720 The University of West Florida DAC
SECTION ONE: General Information

Name of Institution:

Name of Business Officer/Accountant: Charles E. Clark Phone: (850) 474-3026

Name of Respondent: Jacqueline T. Berger
Title of Respondent: Director of Institutional Research & Planning E-Mail: jberger@uwf.edu
Telephone Number: (850) 474-3118 Fax Number: (850) 474-3253

This report covers financial activity for the 12-month fiscal year beginning July 1, 1998, and ending June 30, 1999.

SECTION TWO: Past Financial Information

Before completing this year's financial data form, please review the financial data submitted by the institution last year as indicated below:

TOTAL Revenues: 84756680.00

General and Educational Expense Items:
- Instruction: 28528835.00
- Research: 3977070.00
- Public service: 1630580.00
- Academic support: 11656925.00
- Library expenditures: 2858289.00
- Student services: 5286126.00
- Institutional support: 11127316.00
- Operation and maintenance of plant: 7532087.00
- Scholarships and fellowships: 5056238.00

TOTAL Educational and General Expenditures (excluding library): 74795177.00

- Mandatory transfers: 0.00
- Nonmandatory transfers: 12640.00
- Auxiliary enterprises: 8384907.00
- Hospitals: 0.00
- Independent operations: 0.00

TOTAL Educational and General Expenditures and transfers: 83192724.00
SECTION III: Financial Data Reporting

Please use the institution's completed Integrated Postsecondary Education Data System (IPEDS) 1999 Finance Survey as submitted by the institution to the U.S. Department of Education on February 22, 2000. For the COC Financial Data Reporting Form that follows, transfer the totals from the IPEDS lines/columns when directed. Before completing the Form, carefully read the instructions on pages 5-6 of this document.

| 0 | Total Revenues | $89,762,919. |

**Total Expenditures by function:**

<table>
<thead>
<tr>
<th>Function</th>
<th>Total Expended</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 Instruction</td>
<td>$29,965,681.</td>
</tr>
<tr>
<td>02 Research</td>
<td>$4,340,808.</td>
</tr>
<tr>
<td>03 Public Service</td>
<td>$1,467,312.</td>
</tr>
<tr>
<td>04 Academic Support</td>
<td>$11,898,532.</td>
</tr>
</tbody>
</table>

05 Includes library expenditures of $2,969,863.

5a. Total expenses for library acquisitions $1,068,493.

| 06 Student Services | $5,462,403. |
| 07 Institutional Support | $12,899,977. |
| 08 Operation and maintenance of plant | $7,529,903. |
| 09 Scholarships & fellowships | $5,309,111. |

10 **Total Educational and General Expenditures** (sub-total of lines 01-04 and 06-09) $78,873,807.

11 Mandatory transfers $0.

12 Non-mandatory transfers $1,659,016.

13 **Total Educational and General expenditures and transfers** (sub-total of lines 10, 11, and 12) $80,532,823.
<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>14</td>
<td>Auxiliary enterprises</td>
</tr>
<tr>
<td>15</td>
<td>Hospitals</td>
</tr>
<tr>
<td>16</td>
<td>Independent operations</td>
</tr>
<tr>
<td>17</td>
<td>Total expenditures and transfers (Sum of lines 13-16)</td>
</tr>
</tbody>
</table>

Difference between total revenues (line 0) and total expenditures (line 17): $ 517,803.
(Note: If the difference is negative, send a letter with this report explaining why.)

SECTION IV: Signatures of Verification

We certify that the information provided in this Profile is correct.

[Signature of Chief Executive Officer] 3/13/2000

[Signature of Respondent] 3/10/00

Completion Checklist:

1. Is the Financial Profile complete?
2. Has the institution submitted two copies of the completed Financial Profile?
3. Has the institution submitted a copy of its IPEDS Finance Survey, Parts A, B, and E for FY 1999 as completed and sent to the U.S. Department of Commerce for the U.S. Department of Education February 22, 2000?
4. Have the respondent and chief executive officer provided signatures of verification?

Return this completed Finance Profile and all required materials to:

Commission on Colleges
AT IN: institutional Profiles
Southern Association of Colleges and Schools
1866 Southern Lane
Decatur, Georgia 30033-4097

DUE DATE: March 24, 2000