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## ABSTRACT

The Education Data Elements Dictionary (EDED) is divided into six main subject categories and related higher educational data elements are defined and described under each area and sequenced alphabetically. In instances where compound phraseology is appropriate, the key word has been utilized to determine its placing in the alphabetical sequence. The six main subject categories are: institutional data elements, faculty/staff data elements, student data elements, physical facilities, financial, and general education. Within each main subject category simple phrases and compound phrases are defined. In instances where a particular phrase carries one definition which has several parts, those parts are delineated and/or defined with cross-references. (Author)

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# EDUCATION DATA ELEMENTS DICTIONARY

SECOND EDITION

ED 082671

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# EDUCATION DATA ELEMENTS DICTIONARY

September 1973

**INSTITUTE FOR SERVICES TO EDUCATION, INC.**

2001 S Street, N.W., Washington, D.C.

## TABLE OF CONTENTS

	Page
I. Preface	
History of the Education Data Elements Dictionary (EDED) . .	v
Scope and Format . . . . .	v
Editorial and Research Staff . . . . .	vii
II. Education Data Elements Dictionary . . . . .	1
Institutional Data Elements . . . . .	1
Faculty / Staff Data Elements . . . . .	7
Student Data Elements . . . . .	21
Physical Facilities Data Elements . . . . .	45
Financial Data Elements . . . . .	79
General Education Data Elements . . . . .	101
III. Appendixes . . . . .	111
IV. References . . . . .	147
V. Index . . . . .	151

## HISTORY OF THE EDUCATION DATA ELEMENTS DICTIONARY (EDED)

The Management Information Systems (MIS) Directorate of the Institute for Services to Education, Inc. has as one of its TACTICS (Technical Assistance Consortium to Improve College Services) assignments the delivery of statistical reports to the 113 participating TACTICS colleges and universities. These statistical reports illustrate both current and historical educational trends and indexes on these 113 institutions utilizing quantitative data collected from them. One of the first road blocks MIS encountered in its initial effort in carrying out this assignment was the absence of any standardized set of educational terminology; that is, terminology which could be utilized in defining words and phrases associated with the field of higher education.

MIS's first attempt toward a partial solution to the problem of standardizing sets of higher education terminology is represented by its first publication of the Education Data Elements Dictionary (EDED) in June of 1972. Though the intention of this *initial* publication generally was to facilitate communication between TACTICS college faculty and administrators, MIS learned through communication with non-TACTICS institutions that the EDED was just as valuable to them. This second edition of the EDED, therefore, has been expanded considerably to encompass descriptions and definitions of higher educational data elements utilized by both the Federal, State, and Local agencies in surveying post-secondary educational institutions. It should prove valuable not only to the TACTICS institutions to which it is initially directed but to all institutions of higher education.

## SCOPE AND FORMAT

The scope and format of this edition have been preserved pretty much as in the previous edition. That is, the dictionary is divided into six main subject categories and related education elements are defined and described under each area and sequenced alphabetically. In instances where compound phraseology is appropriate, the key word has been utilized to determine its placing in the alphabetical sequence (i.e., Highest Level of Offering—the key word is "Highest"). The six main subject categories are:

- Institutional Data Elements
- Faculty/Staff Data Elements
- Student Data Elements
- Physical Facilities
- Financial
- General Education

Within each main subject category simple phrases (e.g., Address) and compound phrases (e.g., Credit Hours Taught) are defined. In instances where a particular phrase carries one definition which has several parts, those parts are delineated and/or defined with cross-references.

Example: *Instruction Type*—The categorization of the methods by which organized instruction is conducted, reflecting educational technology and the use of the facilities, materials, and equipment. (See also: Section III., “Medium of Instruction,” p. 35)

*Lecture*—Formal presentation of a prepared discourse. Primarily, one-way communication.

*Laboratory*—Instructor prepares and supervises the execution of investigations by the class.

*Recitation/Discussion*—Two-way communication of the contents of course materials.

*Seminar*—Students carry the major preparation responsibility for the class.

*Independent Study*—Student or students work independently of the instructor but under his direction.

*Programmed Instruction*—Contents of the course presented to the student through programmed materials, television, or other similar forms of presentation.

*Other*—For methods of instruction not covered by the above categories.

The scope of the EDED, as was indicated in the previous “History” section, has been broadened considerably. The first edition carried definitions and description of some two hundred twenty-eight (228) education data elements. This edition defines three times the number of elements as the previous edition.

Appendix A interprets all abbreviations utilized throughout the dictionary and the Reference section provides a list of the publications utilized in researching and developing the dictionary.

The index collects in a single alphabetical sequence all the data elements described and defined in the six main categories. Where a data element is listed in two or more categories it is indicated in multiple page numbers.

The general over-all plan of the previous EDED proved valuable to its users. This editor, therefore, maintained essentially the same format and plan as the previous edition and added a new category entitled General Education.

This category carries definitions of data elements which could not accurately be subsumed under the five previous categories but nonetheless are part of the on-going vocabulary of educators generally. Comments on the previous edition surfaced questions which this category should prove most valuable in answering (e.g., "Public Service Program").

The final consideration for the development of this edition had to do with the expansion of content and preservation of the format without increasing too much the size of the volume. The editors, therefore, decided to reduce the overall size of this edition to 6 x 9 rather than the previous 8½ x 11, thereby making the volume more compact. Consistent with the reduction in size, the format of a page was extended to a full page print rather than the double column page, thus preserving legibility.

#### **EDITORIAL AND RESEARCH STAFF**

The editing, checking, researching, proofreading, and related operations for the development of the dictionary have been carried out by several persons. It would be ungracious not to mention at least the principal architects of this edition. The reviewing and writing of the initial definitions were performed by Dr. Emery Bacon from the staff of the University Associates, Incorporated and Ms. Linda Jackson of the Management Information System Division (MIS) of the Institute for Services to Education, Inc. (ISE); cross-referencing and proofreading by Ms. Jackson of ISE and the Director of MIS/ISE; appendixes, references, and indexing were completed through the combined efforts of the personnel previously mentioned, together with Ms. Judy Bailey of the MIS/ISE staff.

The print selection, eletrotyping, together with additional proofreading have been done by Planning Research Corporation, whose publication staff have yet again given their hearty cooperation and assistance in the development of this edition.

The Education Data Elements Dictionary represents the collaborative efforts of the permanent Institute for Services to Education's MIS staff, with the assistance of others previously mentioned. It is the product of an organization with a background of providing a wide range of services to the field of education. We offer it to the educator with the conviction that it will serve him well.

James A. Welch  
Director MIS/ISE

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## **I. Institutional Data Elements**

### **ACADEMIC DEPARTMENT**

Those organizational units of an institution of higher education which implement the instruction, research and public service programs of that institution. Vocational-technical units are included also. The term is used in the broad sense of any academic organizational unit and is used to distinguish these organizational units from administrative departments.

### **ACCREDITATION**

Voluntary self-evaluation by an institution of higher education, and appraisal by a group of its peers through nationally recognized accrediting agencies and associations.

#### *Regional*

Accreditation by one of the six regional associations applies to the entire institution. (In some cases, a regional association will accredit a 4-year institution as a junior college, thus not accrediting the entire institution.)

#### *Professional*

Various specialized or professional schools and programs are accredited by professional associations. The accreditation applies only to the specific program. Regional and professional accreditation overlap.

(See: Section I., "Pre-Accreditation Status," p. 4)

### **ADMINISTRATIVE DEPARTMENT**

Those organizational units of an institution of higher education which provide student services and institutional support services to the academic departments or to those individuals being served by academic departments. The organizational units which house the academic support, student service, and institutional support programs of an institution. Nonacademic departments.

### **ADMISSION REQUIREMENTS**

Minimum requirements for admission to institution and/or any of the defined programs.

### **ADDRESS**

Street and number, city, state and zip code.



## **AUXILIARY ENTERPRISES**

Programs or entities which exist to furnish a service to students, faculty, or staff, and which charge a fee that is directly related to, although not necessarily equal to, the cost of the service. The general public may incidentally be served in some auxiliary enterprises. Examples are: residence halls, food services, and student stores.

(See: Section V., "Auxiliary Enterprises," p. 81)

## **CONTROL OR AFFILIATION**

<i>Public</i>	<i>Private</i>
Federal	Independent, nonprofit
State	Organized as profitmaking
Local	Affiliated with religious group
State and local	(See: Appendix C for list of religious groups.)
State-related	

## **DATE INSTITUTION WAS ESTABLISHED**

The month and year that the institution was founded.

## **DATE POST-SECONDARY OR COLLEGE WORK FIRST OFFERED**

The month and year that post-secondary classes started.

## **DEPARTMENT**

The basic organizational unit of a college or university. Includes both the academic and administrative organizational units.

## **EVENING COLLEGE**

Separately organized program offering courses creditable toward associate, bachelor's, or graduate degrees.

## **EXTENSION AND PUBLIC SERVICES**

A program of educational and other activities designed primarily to serve the general public as contrasted with enrolled students. Examples are correspondence courses, adult study courses, public lectures, radio and TV courses, institutes, workshops, demonstrations, package libraries, radio and television stations, state-wide surveys, agriculture and home economics extension programs. (Distinguished from auxiliary enterprises by the clientele served.)

## **FICE CODE**

Every institution of higher education has a Federal Interagency Committee on Education (FICE) code, maintained by the Office of Education (OE) and reported in the annual *Education Directory—Higher Education*. This is an unstructured number that is unique for each institution and normally is not changed for the life of the institution. (FICE codes for all institutions of higher education are also available on the OE Survey Control File (SCF) which is the Directory in computer tape form and may be obtained from the Office of Education.

## **HIGHEST LEVEL OF OFFERING**

The following categories are used in the *Education Directory—Higher Education* to designate institutions of higher education by highest level of offering.

### ***Two but less than 4 years***

Refers to at least 2 but less than 4 years beyond 12th grade; includes junior colleges, community colleges, technical institutes, and normal schools offering at least a 2-year program of college-level studies, either leading to an associate degree or wholly or principally creditable toward a baccalaureate degree.

### ***Four- or 5-year baccalaureate***

Includes those institutions offering programs of studies leading to the customary bachelor of arts or bachelor of science degree, requiring at least 4 but less than 6 years.

### ***First-professional degree***

Includes those institutions that offer the academic requirements for selected professions based on programs that require at least 2 academic years of previous college work for entrance and a total of at least 6 years of college work for completion; e.g., medicine (M.D.), law (LL.B., J.D.), theology (B.D.), dentistry (D.D.S.), veterinary medicine (D.V.M.).

### ***Master's***

Includes those institutions offering the customary first graduate degree, master of arts or master of science degree in the liberal arts and sciences, or the next degree in the same field after the first-professional degree; e.g., Master of Science in Surgery (M.S. in Surgery), Master of Law (LL.M.), and Master of Science in Dentistry (M.S.D.)

### ***Beyond Master's but less than doctorate***

Includes those institutions offering "postgraduate predoctoral degrees"; e.g., Civil Engineer, Electrical Engineer, Specialist in Education.

### ***Doctorate***

Includes those institutions offering the Ph.D. or its equivalent in any field; e.g., Doctor of Education, Doctor of Juridical Science, Doctor of Public Health.

*Undergraduate non-degree-granting*

Includes those institutions offering at least 4 years of undergraduate work but not conferring a bachelor's degree. Such institutions may give diplomas, certificates of completion, or similar awards.

*Graduate non-degree-granting*

Includes institutions offering work beyond the bachelor's level but not conferring degrees. In some instances, the degrees are conferred by cooperating institutions.

*Postdoctoral research only*

Includes institutions operating solely for the purpose of research at the postdoctoral level (post-Ph.D. or equivalent).

**MAJOR SERVICE PROGRAM(S)**

Program(s) undertaken primarily as community or public services, not essential in meeting the educational objectives of the institution; e.g., Federally Funded Research and Development Centers, Hospitals which serve the community or State, etc.

**NAME OF INSTITUTION**

Full title of institution. For purposes of data exchange by mechanized record use the 25-character limit name appearing in the *OE Education Directory—Higher Education*.

**ORGANIZATIONAL UNIT**

The basic component of the organizational structure of a college or university. Usually referred to as a department but including both academic units (English Dept., Physics Dept., etc.) and administrative units (Office of the President, Registrar, Physical Plant, etc.)

**PRE-ACCREDITATION STATUS**

Preliminary stages to full accreditation

*Correspondent*

Institution not yet in full operation; evidences qualities likely to lead to accreditation.

*Recognized Candidate for Accreditation*

Institution in full operation, proceeding satisfactorily on the way to meeting criteria for accreditation.

*Pre-Accreditation, Professional*

Varying terminology and criteria are used by the professional associations.

(See: Section I., "Accreditation" p. 1)

**PREDOMINANT CALENDAR SYSTEM**

Includes semester, quarter, trimester, other.

**PROGRAM**

A set of activities which, operating collectively, achieves a well-defined objective, or set of objectives, of the institution within a stated time period.

**SEX OF STUDENT BODY**

Male, Female, Coeducational.

**SUMMER SESSION**

A period between the end of the second, or spring, semester and before the beginning of the next first, or fall, semester (or, less commonly, after the spring, and before the fall quarters or trimesters) during which special adaptations of the regular program, or special programs, are offered. Also, the administrative or budgetary entity which manages and supports such programs.

**TYPE OF PROGRAM**

The designations of the types of program are taken from the *Education Directory—Higher Education*.

*Terminal-occupational below the bachelor's*

Programs of at least 1 but less than 4 years beyond high school, designed to provide students with knowledge and skills necessary for immediate employment but for which credits are not ordinarily acceptable toward baccalaureate degree programs.

*Two-year principally bachelor's creditable*

First 2 years of college work; i.e., the equivalent of the freshman and sophomore years or the lower division of a bachelor's degree program. Such a program may be general or preprofessional; it may serve as the first 2 basic years of a bachelor's degree in a liberal arts program, in a teacher preparatory program, or in a professional program.

*Liberal arts and general*

Four- or 5-year baccalaureate or postbaccalaureate degree programs in the liberal arts and sciences. It may also include preprofessional programs (such as pre-law, pre-library, science, pre-social work, and pre-medicine.)

*Teacher preparatory programs*

Programs to prepare elementary and secondary school teachers. Must be of at least 4 years' duration.

*Professional programs*

Not first-professional programs exclusively, but a unique, single-purpose use of the term to encompass separate programs of at least 4 years beyond high school, outside liberal arts and general, and organized around a professionally oriented academic discipline. Included are 4- or 5-year degree programs in agriculture, business administration, engineering, etc., as well as those programs leading to the 6-year-or-more first-professional degrees.

(See: Section I., "Highest Level of Offering," p. 3)

## **II. Faculty/Staff Data Elements**

### **ADDRESS, BUSINESS (CAMPUS)**

Address of on-campus office or other campus location where staff member's university mail is received. Include:

- P.O. Box or Name of Department
- Name of Institution
- Number and Street
- City
- State
- Zip Code
- Business Phone: Area Code/Telephone Number

### **ADDRESS, PERMANENT**

Address of legal residence, whether domestic or foreign. Include:

- House or apartment number
- Street
- City
- State
- Zip Code
- Country, if foreign
- Area Code/Telephone Number

### **ADDRESS, PRESENT (LOCAL)**

Address of local residence while employed by given college or university. Include:

- House or apartment number
- Street
- City
- State
- Zip Code
- Area Code/Telephone Number

### **ADMINISTRATIVE**

An occupational activity category consisting of assignments with the primary duty of planning, organizing, and managing the institution or a major subdivision or service of the institution.

### **ADMINISTRATIVE TITLES**

Titles typically associated with assignments in the administrative occupational activity category. (Beginning with the Higher Educational General Information

Survey (HEGIS) for 1973-74, the titles used in that survey are identical to those used in the administrative salary survey of the College and University Personnel Association.)

**APPOINTMENT, EFFECTIVE DATE**

Date appointment officially begins. Include month, day, year.

**APPOINTMENT, EXPIRATION DATE**

Date appointment officially ends. Include month, day, year.

**APPOINTMENT, LENGTH**

The period for which appointment or contract is applicable in months, years, or number of school terms.

(See: Section II., "Tenure Status," p. 20)

**APPOINTMENT, TITLE**

Title of position to which appointed at institution.

**APPOINTMENT, TYPE**

Status of appointment:

- Regular
- Temporary
- Visiting
- Acting

**ASSIGNMENT**

A set of related activities which the employee is expected to perform in an occupational category. The employee may devote all or only part of his time to a particular assignment. An employee may be given more than one assignment.

**BIRTH DATE**

Include month, day, year. (00/00/00)

**BIRTH PLACE**

Include city and state or country of birth.

## **CITIZENSHIP OR RESIDENCE STATUS**

Designate:

U.S. Citizen

- Natural born
- Naturalized

Foreign

- Specify country
- Specify visa status (e.g., visitor, student, permanent resident, etc.)

## **COMPENSATION**

Includes salary (See: Section II., "Salary," p.18), plus countable fringe benefits (See: Section II., "Fringe Benefits," p.11), for a specified period of time, usually the fiscal year.

## **CONTRIBUTED SERVICES**

In institutions conducted by religious orders, societies, or similar groups, the estimated monetary value of the services of members of the organization who receive no monetary compensation. Also, in all institutions, any persons who receive compensation from sources other than the institution, such as military personnel who are paid by the Department of Defense to teach Reserve Officers' Training Corps (ROTC) courses.

## **COURSE ASSIGNMENT(S)**

List the course (teaching) assignments for each faculty member, include:

- School term and year
- Department
- Course subject
- Course title
- Course number
- Section number
- Number of credit hours

## **CREDIT HOURS TAUGHT**

Total credit hours of all courses taught by a faculty member for any particular term.

## **DEPENDENT**

One who is dependent upon the named for at least half of his support. Specify dependent's relationship; e.g., child, spouse, parent, etc.



### **EMERGENCY CONTACT**

The person who should be contacted in case of an emergency, include:

- Name
- Address
- Telephone (business and home)
- Relationship

### **EMPLOYEE, CONTRACT TERM**

Indicates the contract term by months; e.g., 9-month, 10-month, or 12-month contract.

(See also: Section II., "Salary," p. 18)

### **EMPLOYEE, NEW**

Identifies an employee hired within the current academic year.

### **EMPLOYEE, OLD**

Identifies an employee who has been employed with the institution for more than one academic year, or a returning employee who had at one time been employed by the institution, but not during the previous year.

### **EMPLOYMENT, MAJOR FIELD**

Indicates the major subject area(s) of employment. (See: Section III., "Academic Disciplines," p. 21)

### **EMPLOYMENT, PREVIOUS**

Information on past job appointments. Include:

- Job title and/or rank
- Name of employer
- Address of employer
- Beginning and ending dates of employment
- Ending salary

### **ENGAGED IN RESEARCH**

The state of participating in investigative and scholarly activities which are intended to produce new knowledge and which are recognized by the institution in the form of funding or released time or other work load reduction.

### **EXPERIENCE, NUMBER OF YEARS**

Total number of years of experience for which given credit by employing institution.

### **EXTENSION AND PUBLIC SERVICE STAFF**

Indicates personnel engaged in agricultural extension, engineering, homemaking, other extension or cultural activities. Should also include faculty offering degree or non-degree credit instruction in extension, adult or continuing education in classroom or by correspondence, radio, or commercial television.

### **FACULTY**

That portion or segment of the instructional or research staff bearing titles of Professor, Associate Professor, Assistant Professor, Instructor, or any modified form of such titles, as, Adjunct Professor, Research Associate Professor, Visiting Assistant Professor, etc. Members of the teaching staff bearing titles such as Lecturer, Fellow, Teaching Fellow, Graduate Assistant, or members of the research staff bearing titles such as Research Associate, Scientist, Research Director, Analyst, etc., while considered members of the professional staff, or in some institutions denominated as "academic," are not faculty. The term is declining in utilization in systems of management and analysis for lack of precision, or is used interchangeably with "Instructional Staff."

### **FACULTY CONTACT HOUR(S) (FCH)**

One hour spent by one instructional staff member in contact with a scheduled section.

### **FACULTY-TOTAL**

Sum of current instructional staff, conventionally disaggregated by various characteristics, as follows:

- Sex
- Rank
- Racial/Ethnic Background
- Highest Earned Degree

Distinguished from tabulations of faculty positions even if positions are tabulated by characteristics of incumbent.

### **FRINGE BENEFITS**

For purposes of computing compensation rate or total to an employee, without regard for the financial record, which will differ, include only those where the institution makes a definitive payment of a specified amount on

behalf of, and for the benefit of all individual employees of a definable group, such as a faculty, nonprofessional staff, etc.

*Federal Old Age Survivors  
and Disability Insurance (FICA)*

The Federal act providing for employee/employer social security contributions to trust funds with subsequent monthly cash benefits paid to retired worker, and benefits for hospital care or death.

*Retirement Programs*

Those which become vested in the employee in 5 years or less.

*Medical and Hospital Insurance  
(Basic and Major)*

Insurance coverage for hospital rooms and services; surgical plans providing for a licensed surgeon; and basic and major medical plans providing for medical expenses, which the institution pays in whole or in part.

*Group Life Insurance*

Life insurance with all or part of the cost paid by the institution.

*Disability Income Protection*

Provisions for long-term disability income payments through institutional self-insurance or commercial policy with the institution contributing all or part of the cost.

*Workmen's Compensation*

Legal benefits to workers, or their survivors, who sustain personal injury in the performance of duty for their employers.

*Unemployment Compensation*

Legal payments in lieu of wages to workers who are laid off and unable to find compatible employment.

*Housing Allowances or Housing*

Only if an equivalent cash benefit is available to all members of the definable group who prefer to live in housing other than that provided by the institution.

*Tuition for Employee's Children*

For tuition of children of an employee group only if the institution arranges for cash assistance for all children of that group, regardless of the institution they attend. (The cost to the institution is computed as the maximum available cash allowance per student times the number of eligible children attending.)

(*Benefits in kind* are recorded as a compensation cost to the institution, but not as part of the compensation rate or total to an employee unless there is a cash option when benefits are not received. Sabbatical plans are similarly usually not included in compensation rates.)

#### **FULL-TIME EQUIVALENT STAFF (FTE)**

The equivalent of one person who is deemed to be carrying a full load or having a full-time appointment in institutionally agreed upon convention for converting numbers of specific employees to an equivalent number of full-time persons.

Computed on the basis of appointment fraction. For the special purpose of computing FTE instructional staff actually engaged in teaching, compute as follows:

$$\begin{array}{r} \text{Total full-time} \\ \text{instructional staff} \end{array} + \frac{\begin{array}{r} \text{Total load of part-time} \\ \text{instructional staff} \end{array}}{\begin{array}{r} \text{Normal load of one full-time} \\ \text{instruction staff member} \end{array}}$$

#### **FULL-TIME INSTRUCTIONAL STAFF**

Any full-time employee of the institution who devotes more than one half of his time to the teaching of students enrolled at the institution and/or other directly related activities such as curriculum planning, department chairmanship, etc.

#### **GRADUATE ASSISTANT (TEACHING)**

An individual who is considered by the institution to be a graduate student and in addition is assigned to perform particular instructional activities. Includes the categories of Teaching Assistant and Associate where used.

#### **HEAD-COUNT FACULTY**

Any individual considered by the institution to be a faculty member without regard to the work load being carried includes both full-time and part-time faculty members.

#### **HIGHEST ACADEMIC DEGREE OR DIPLOMA**

In the record of each student, faculty member, other professional, and all other staff where appropriate and useful, an entry of the earned educational attainment, selected from one of the following:

- No academic credential
- High school diploma or GED

- Trade or craft certificate
- Professional certificate
- Associate degree
- Bachelor's Degree
- Master's Degree
- First Professional Degree
- Second or Third Professional Degree
- Doctorate

#### **IDENTIFICATION NUMBER (I.D. NO.)**

A number, based on a pre-determined system, used to properly identify each person in the institution. The university may wish to attach a university number in order that its personnel can be identified even when grouped with persons from other institutions.

#### **INSTRUCTIONAL ACTIVITIES**

Includes:

- Academic committee participation
- Classroom instruction
- Development of instructional materials
- Graduate thesis supervision
- Laboratory instruction
- Seminars
- Student conferences

#### **INSTRUCTIONAL STAFF**

All persons, whatever their title or status, engaged in teaching students. Includes faculty and other instructional staff. (See also: Section II., "Faculty," p. 11)

#### **INSTRUCTIONAL STAFF POSITION**

A budgeted position intended to be occupied by a member of the instructional staff; described in terms of percent of full-time derived from this budget, rank, and budgeted salary. For purposes of analyzing personnel policies and administration, instructional staff positions are disaggregated in terms of the various characteristics of the incumbents. To analyze personnel turnover, positions may be tabulated on basis of factors related to incumbency:

#### ***Continuing***

The position is occupied by the employee who occupied it during the previous fiscal year.

*New*

The position is occupied by an employee who was not employed in that position during the previous fiscal period. (If the institution's planning process justifies the need, this "New" category may be further divided into those positions occupied by employees new to the institution and employees previously occupying other positions elsewhere in the institution.)

*Resigned*

The position was occupied in the previous fiscal period by an employee who voluntarily terminated his employment.

*Vacant*

The position is not presently occupied because of institutional action or policy; e.g., it is newly-established, the previous incumbent resigned more than 1 year ago, the previous employee left at the conclusion of his contract, etc.

The "Continuing" and "New" categories may be further disaggregated on the basis of the potential employment duration of the incumbent, in terms of the institution's commitment, as follows:

- Indefinite Tenure
- Term of Years (more than one)
- One Year Appointment
- Appointment for Term of Budget

**INSTRUCTIONAL STAFFING POLICY**

The institutional policy stating the instructional load considered (on the average) to be a full-time load of an instructional staff member. Instructional staffing policies are most commonly expressed in terms of Student Credit Hours per Full-Time Equivalent instructional staff member or Weekly Faculty Contact Hours per Full-Time Equivalent instructional staff member. Within an institution, instructional staffing policies may vary by department (discipline) course level, or type of instruction.

**LICENSES, CERTIFICATES, AND REGISTRATIONS**

Specific credentials entitling the employee to engage, legally, in the practice of a profession (Medical License, Bar Membership, C.P.A., R.N., etc.)

**MARITAL STATUS**

Specify:

- Single—those never married, divorced, or widowed
- Married—those married and living with or separated from spouse

## **MILITARY STATUS**

Designate current military status:

- Active Duty
- Discharged
- Non-veteran (indicate selective service number and status)
- Reserve or National Guard
- Retired

## **NAME**

A person's legal name, include: last name, first name, middle initial, maiden name.

## **NONACADEMIC PROFESSIONALS**

Employees working in nonacademic departments, who are engaged in activities which require specialized and advanced training.

## **NONINSTRUCTIONAL ACTIVITIES**

Includes:

- Administration
- Coaching
- Consulting
- Faculty committees
- Organized research
- Public Service activities
- Student counseling
- Student organization advising

## **NONPROFESSIONAL STAFF**

Employees occupying positions that conventionally do not require as much as a baccalaureate degree (unrelated to the educational attainment of the incumbent).

## **OCCUPATIONAL ACTIVITY CATEGORIES**

Seven broad occupational activity categories are described and defined in the *Manual for Manpower Accounting in Higher Education*, as follows:

- Executive–Administrative–Managerial
- Instructional
- Professional
- Technical
- Office
- Crafts and Trades
- Service

### **PARAPROFESSIONAL STAFF**

Personnel who lack the usual educational requirements, but who, due to some special experience, skill, or need, hold positions and perform functions generally held by professionals only.

### **PART-TIME INSTRUCTIONAL STAFF**

Any member of the instructional staff who is less than a full-time employee of the institution, or a full-time employee of the institution who devotes some, but less than one half of his time to the teaching of students enrolled at the institution and/or other directly related activities such as curriculum planning, department chairmanship, etc.

### **PERSONNEL INVENTORY**

A tabulation of all personnel at the institution. Personnel may be categorized by the Fair Labor Standards Act, or by the Occupational Activity and Program Function Categories of the *Manual for Manpower Accounting in Higher Education*.

### **PREVIOUS EMPLOYMENT, TYPE**

The type of employee's previous employment just prior to appointment at this institution. First disaggregated by professional and nonprofessional, the types are:

- Government
- Industry
- University
- Student
- Self-Employed
- Military

(See also: Section III., "Occupation," p. 36)

### **PROFESSIONAL AFFILIATIONS**

A listing of those professional organizations and educational and/or honor societies to which a staff member belongs.

### **PROFESSIONAL STAFF**

Employees occupying positions that conventionally require at least a baccalaureate degree. (Unrelated to the educational attainment of the incumbent.)



## **PROGRAM FUNCTION CATEGORIES**

Seven program function categories for staff are defined and coded in *The Manual for Manpower Accounting in Higher Education*.

- Instruction
- Organized Research
- Public Service
- Academic Support
- Student
- Institutional Support
- Independent Operations

## **PUBLICATIONS**

A listing of a staff member's publications which have received recognition via distribution of the institution.

Includes:

- Books
- Major magazine and journal articles
- Papers presented

## **RESIDENT INSTRUCTION**

Identifies faculty members engaged in resident classroom and laboratory instruction as opposed to those engaged in extension or public service work.

## **SALARY**

The monetary reimbursement to an employee for services not including the value of fringe benefits. Distinguish between the salary paid or actual dollars received. Salary rates are stated in terms of a fixed period; e.g., per month, per year, etc., and are always stated for full-time employment. For professional staff, this period is usually for 1 fiscal year, with changes in rate occurring at the start of the fiscal year or other budget period. For faculty and other instructional staff, the period may be for 1 academic year, or 9 months. For the American Association of University Professors (AAUP) reporting, all faculty salaries are reported as 9-month rates, with rates for 11 or 12 months converted to a 9-month basis by applying a conversion factor of 9/11 or by an official factor used in a *publicly announced formula*. For HEGIS reporting, faculty salaries are reported in two groups, those employed on an academic year base and described by HEGIS as 9-10 months appointees and those employed for the fiscal year, described by HEGIS as 11-12 month appointees.

## **SERVICE PERSONNEL**

An occupational activity category with no necessary relation to the program and organizational unit the employee is assigned. (See: Section II., "Occupational Activity Categories," p. 16).

**SEX**

Specify male or female.

**SOCIAL SECURITY NUMBER**

Often used as an I.D. (000-00-0000)

**STAFF IN ACADEMIC DEPARTMENTS**

All employees assigned to academic departments. For purposes of the Higher Education Facilities Planning and Management Manuals, the term academic departments is used to denote all organizational units of an institution of higher education which house the Instruction, Research, and Public Service programs of the institution. The term is used in the broadest sense and is used to distinguish such organizational units from administrative departments (i.e., those organizational units which provide support service to the academic departments, students, or to the institution as a whole.)

**STAFF, JUNIOR**

Professionals who assist the senior staff member. Graduate students who offer support to the senior staff in organized research, may be so classified, for example.

**STAFF, RESIDENT INSTRUCTIONAL  
AND DEPARTMENTAL**

Faculty engaged in resident classroom and laboratory instruction.

**STAFF, RESIDENT RESEARCH**

Faculty engaged either in resident organized research or research which is an integral part of the instructional program.

**STAFF, SENIOR**

Includes persons having major responsibility in schools, colleges, departments, or in conducting organized research, such as:

- Professors
- Associate Professors
- Assistant Professors
- Instructors
- Lecturers
- Visiting Professors
- Adjunct Professors
- Interim Professors

The term "senior staff" may be used for institutional management, but it has limited utility for analysis or information exchange.

### **TEACHING LOAD**

The traditional measure of teaching load is the number of credit hours taught, with an institutionally agreed upon convention for converting instructional activities which have no credit hour value into credit hour equivalents (See: Section II., "Instructional Activities," p. 14) e.g., contact laboratory hours may be given credit hour equivalents on the basis of 1 credit hour equivalent per 1 and one-half clock hours.

### **TENURE STATUS**

The institutional code for the potential employment duration of an employee, in terms of the institution's commitment

- Indefinite tenure
- Term of years (more than one)
- One year
- Appointment for term of budget

### **WEEKLY FACULTY CONTACT HOURS**

The number of hours spent by instructional staff members in contact with scheduled Sections in one week. (Usually but not necessarily equal to Weekly Contact Hours.)

### **III. Student Data Elements**

#### **ACADEMIC DISCIPLINES, DEPARTMENTS, ETC.**

For the categorization of the fields of student majors, fields of the faculty, degree majors, the student registrations per department, student credit hours, degrees granted, etc., the data should be categorized on the basis of the HEGIS *Taxonomy of Instructional Programs in Higher Education* (also known simply as the HEGIS Disciplines) for the greatest possible consistency and comparability. (See Appendix B, for total list.)

#### **ACCEPTED, NUMBER**

The aggregate of different individuals who, having made application, have met the institution's standards and criteria for students at the institution. The total number of prospective students accepted is conventionally disaggregated on the same bases as the number applied. (See: "Applied Number," p. 23)

#### **ADDRESS, BILLING**

Address of person to whom university billings should be mailed, usually parent, guardian, or spouse; sometimes employer. Includes:

- Name of person to whom bill is addressed, if different from student
- House or apartment number
- Street
- City
- State
- Zip code
- Country, if foreign
- Area code/telephone number

#### **ADDRESS, PERMANENT (LEGAL)**

Address of legal residence, whether domestic or foreign. Include:

- House or apartment number
- Street
- City
- State
- Zip code
- Country, if foreign
- Area code/telephone number

#### **ADDRESS, PRESENT (LOCAL)**

Address of local residence while in attendance at the university or college. For off-campus residence, include:

- House or apartment number

- Street
- City
- Zip code
- Area code/telephone number

For on-campus residence include:

- Dormitory or apartment name and number, if applicable
- Street, if applicable
- Mail box number
- Name of institution
- City
- State
- Zip code
- Area code/telephone number

#### **ADMISSION ACTION**

Describes the action taken on the student's application for admission. Specify:

- Admitted
- Denied
- No Action (Pending)
- Re-directed

#### **ADMISSION ACTION, DATE**

Indicates the date and term for which the student was admitted to the institution. Include:

- Month
- Day
- Year
- Term (based on standards of the institution)

#### **ADMISSION STATUS**

Indicates the most recent admission status of the student to the current institution. Specify student status.

##### *First-time student*

One who is entering an institution of higher education for the first time.

##### *Transfer student*

One who has previously attended another college or university, and is transferring from that institution to current institution.

##### *Special student*

One who is not working toward a degree or certificate at current institution.

*Re-admit*

Student who was previously enrolled in current institution, but due to absence from the institution for one or more terms, was required to reapply for admission.

*First-time post-baccalaureate*

One who already has one or more degrees, but is entering this institution at the graduate or professional level for the first time.

**APPLICATION**

The formal procedure by which a prospective student seeks evaluation and approval by the institution to enroll as a student in a subsequent term or attendance period.

**APPLIED, NUMBER**

The aggregate of different individuals who have made applications for enrollment. An institution's total number applied is conventionally disaggregated by entering level (first time, transfer, etc.) sex, racial/ethnic background, or other characteristic of the prospective students, and by categories of programs or organized instructional units.

**ATTENDANCE STATUS**

Full-time and part-time only; sub-divisions of part-time are not meaningful. Attendance status is a common and conventional basis for the disaggregation of various student totals.

**BIRTH DATE**

Include month, day, year. (00/00/00)

**BIRTH PLACE**

Include city and state or country of birth.

**BOOKS AND SUPPLIES COSTS**

Generally, this is not a cost charged to the student by the institution, but is a cost derived from the necessity for texts, reference books, biology kits, slide rules, notebooks, paper, pencils, etc., in order to learn effectively in a course. These data are normally acquired by survey and are recorded for analytic purposes, usually on a "per year" basis because many of the items purchased are utilized for more than a semester, quarter or term.

## **CAREER CHOICE**

The career for which student intends to prepare.

## **CITIZENSHIP OR RESIDENCE STATUS**

(See: Section II., "Citizenship or Residence Status," p. 9)

## **CIVIL RIGHTS RACIAL/ETHNIC CATEGORIES**

For the various Federal and State civil rights compliance and action programs the following racial/ethnic categories of students and staff are required:

- Oriental
- American Indian
- Negro or Black
- Spanish-Surnamed American
- All other (include Caucasian)

A superior categorization for institutional purposes, and which will collapse into the above, racial categories are as follow.

### *Asian American*

Persons who identify themselves ethnically as being of Chinese, Japanese, Korean, Taiwanese, Hawaiian, Samoan or Filipino descent.

### *Black American*

Persons who identify themselves ethnically as being of Black or Afro-American descent.

### *American Indian*

Persons who identify themselves ethnically as being of native American Indian descent, including Canadian and Alaskan natives.

### *Chicano or Mexican American*

Persons who identify themselves on basis of surname or ethnic background as being of Chicano or Mexican-American descent.

### *Spanish-Surnamed American*

Persons who identify themselves on the basis of surname or ethnic background as being of Puerto Rican, Cuban, and other Spanish descent.

### *All Other American Ethnic Minorities*

Persons who identify themselves ethnically with a minority group other than those listed above.

*White Americans*

Persons who identify themselves ethnically as being of European or other Caucasian descent.

*Foreign*

Persons who carry F or J visas. Distinguished from American citizens or residents of similar ethnic descent.

*Refused to Indicate*

Persons who decline to respond.

**COLLEGE PREVIOUSLY ATTENDED**

Specify:

- Name (See: Section I., "Name of Institution," p. 4)
- Address
- FICE Code (See: Section I., "FICE Code," p. 3)

**COLLEGE PREVIOUSLY ATTENDED, TYPE**

Indicates the level of college previously attended by highest level of offering. (See: Section I., "Highest Level of Offering," p. 3)

**COMMUTER STUDENT**

A student whose permanent address and local address are the same, and they are outside the campus periphery or environs.

**CONTRACT BOARD STUDENTS**

Students who, by contract, agree to pay a specified charge for the provision of a certain number of meals during a specified period of time (usually a quarter or semester).

**COURSE**

An organized set of activities pertaining to instruction in a particular subject matter, which is conducted during a given period of time (usually a quarter, semester or term) and for which credit toward the earning of a degree, or other evidence of completion, is usually given. (See also: Section III., "Section," p. 39)

**COURSE CHARACTERISTICS**

Description of a course which indicates the instructional techniques, the course credit hours, and the space and time requirements for the course.



### **COURSE CREDIT HOURS**

The amount of credit offered for a course. The numerical credit value awarded for completion of a course, usually described in semester, quarter, term, or other units of credit toward a degree or certificate.

### **COURSE CREDIT HOURS ATTRIBUTABLE TO "OTHER" INSTRUCTION**

The amount of credit offered for those activities required for the completion of a course which do not occur as formally scheduled classroom or class laboratory activities. For example, credit attributable to such things as independent study, thesis work, field trips, etc.

### **COURSE ENROLLMENT**

One student enrolled in one course or one section of a course. One student may often account for multiple course enrollments. Also referred to as a course registration.

### **COURSE IDENTIFIER**

Unique institutional number or other code that serves to identify a course. This is a structured number that includes identification of the department or other unit offering the course, the code for the HEGIS Subject Field, and program to which the course contributes, as follows:

- General academic instruction
- Occupational and vocational instruction
- Extension (for credit) instruction
- Community education
- Supplementary education

### **COURSE LEVEL**

The level of student (See: Section III., "Student Level," p. 41) at which a course is primarily, but not exclusively, directed. If there is no descriptor, level may be determined by level of predominant students enrolled in course.

### **COURSE WORK, CURRENT**

A listing of complete course information for each course in which a student is currently enrolled. Includes:

- Course number
- Section number
- Course title
- Name of instructor

- Term in which enrolled
- Year in which enrolled
- Number of credits
- School, department, or division in which course is offered
- Meeting day and hours
- Room number and building
- Laboratory hours (meeting time)
- Laboratory instructor

**COURSE WORK, PREVIOUS**

A listing of complete course information for all courses completed by student.

Includes:

- Course number
- Section number
- Course title
- Name of instructor
- Date completed (month, year)
- Credits
- Final grade

**CREDIT HOURS EQUIVALENTS, NUMBER**

For courses for which no credit is offered, a figure to indicate the number of credits it would carry if it were offered for credit. This is usually estimated on the basis of clock hours.

**CREDIT HOURS, NUMBER**

The amount of credit offered for a course; i.e., the numerical credit value awarded for successful completion of a course, usually described in terms of semester, quarter, or term hours.

**CREDIT QUALITY POINTS EARNED,  
CURRENT TERM**

Number of quality points acquired for credits completed for most recent school term. (See also: Section III., "Quality Points," p. 38)

**CREDITS ACCEPTED,  
PREVIOUS COLLEGE**

The number of college credits accepted by current institution from college previously attended.

**CREDITS ACCEPTED FOR QUALITY POINTS,  
PREVIOUS COLLEGE**

The total number of quality points acquired from those credits accepted from previous institution.

**CREDITS ATTEMPTED FOR QUALITY POINTS,  
CURRENT INSTITUTION**

The total number of credits attempted at current institution for which quality points are granted.

**CREDITS EARNED, CURRENT TERM**

The number of credits completed for most recent school term.

**CUMULATIVE CREDITS**

Sum of all credits earned, including those transferred from other institutions.

**CUMULATIVE CREDITS,  
CURRENT INSTITUTION**

Sum of all credits earned at current institution only.

**CUMULATIVE QUALITY POINTS**

Sum of all quality points earned, including those accepted from previous institution.

**CUMULATIVE QUALITY POINTS,  
CURRENT INSTITUTION**

Sum of all quality points earned for all credits completed at current institution only.

**DATES OF ATTENDANCE**

Indicates when a student entered and when he left the institution (whether via graduation, transfer, suspension, or voluntary withdrawal.)

**DEGREE CONFERRED**

Indicate type of degree awarded to student:

- Associate—A.A., A.S., etc.
- Bachelor's—B.A., B.S., etc.
- Master's—M.A., M.S., M.Ed., etc.

- Doctorate—Ph.D., E.E.D., etc.
- First Professional—
  - Chiroprody or Podiatry—D.S.C. or Pod.D.
  - Dentistry—D.D.S. or D.M.D.
  - Medicine—M.D.
  - Optometry—O.D.
  - Osteopathy—O.D.
  - Veterinary Medicine—D.V.M.
  - Law—L.L.B. or J.D.
  - Theology—B.D., Rabbi, etc.
- Other—degree, diploma, certificate, etc.

**DEGREE, MAJOR FIELD**

(See: Section III., “Academic Disciplines,” p. 21)

**DEGREE, PREVIOUS HIGHEST**

(See: Section II., “Highest Academic Degree or Diploma,” p. 13)

**DEGREE PROGRAM**

The mix of instructional offerings in various disciplines which comprise the curriculum for a specific academic degree.

**DEGREE SOUGHT**

The type of degree student is seeking. (See: Section II., “Highest Academic Degree or Diploma,” p. 13)

**DEPARTMENT ENTERING**

Name of the department in which student is/will be registering/enrolling.

**DEPENDENT**

One who is dependent upon the named student for at least half of his support. Specify dependent’s relationship; e.g., child, spouse, parent, etc.

**EMERGENCY CONTACT**

The person who should be contacted in case of an emergency. Include:

- Name
- Address
- Telephone number (business and home)
- Relationship

## **ENROLLMENT**

An aggregate of the different individuals formally participating as recipients in an educational program during a given term or school year. The totals will include all who have registered, usually signified by the payment of fees. Enrollment totals do not include graduate students not currently registered while working on a thesis; they do not exclude students who withdraw during the term or year. An institution's total enrollment is conventionally disaggregated by the student level, sex, attendance status, racial/ethnic background, or other characteristics of the students. (See also: Section III., "Registration," p. 38)

## **ENTRANCE TEST SCORE(S)**

Scores from tests required for or taken before entrance to the institution; such as Scholastic Aptitude Test (SAT)-math and verbal; American College Testing Exam (ACT)—math, verbal, and foreign language; Testing of English as a Foreign Language (TOEFL)-foreign students, etc. Indicate:

- Name of test
- Form or section of test
- Test score

## **EXTENSION STUDENTS**

Traditionally, are students taking face-to-face instruction in centers or places away from the main or branch campuses. It may also include on-campus instruction offered by an extension division. The definition is circular in that extension centers differ from branch campuses in that the students enrolled there are not counted as resident students. The distinction between resident and extension students is no longer maintained by many institutions. Its major remaining use is to distinguish courses and programs requiring varying "mixes" of resource input. It was abandoned in HEGIS for fall 1973. (See also: Section III., "Resident Students," p. 39)

## **FAMILY RELATIONSHIP TO INSTITUTION**

Identifies members of the student's family who are related to the institution in one or more of the following ways: a) alumni; b) on the faculty or staff; c) currently enrolled in the institution as a student. Specify:

- Father (name & relationship to inst.)
- Mother (name & relationship to inst.)
- Brother (name & relationship to inst.)
- Sister (name & relationship to inst.)
- Other relative, such as cousin, aunt, uncle

## **FEE RESIDENCY STATUS**

### *In-State Student*

A student whose permanent residence is in the state of the institution he is attending. At a state institution, this status determines the tuition and fees he is assessed.

### *Out-State Student*

A student who migrates from the state of his legal residence to enroll in an institution of higher education in another state. At publicly supported institutions this student generally pays a higher rate of tuition and fees than does the in-state student.

## **FIRST-TIME STUDENT**

A first-time student may be in any one of three categories: undergraduate (freshman), first professional, and graduate. A student is first-time only once in each category, during the first semester, quarter, or other term that he is enrolled as a student in that category.

### *Undergraduate (Freshman)*

Has never previously enrolled in an institution of higher education (although he may enroll for the first time with some advanced standing credit from military service, equivalency examinations, etc.)

### *First-Professional*

Has never previously enrolled in the particular first-professional program that he is now starting (although he may previously have been enrolled in other first-professional or graduate programs.)

### *Graduate*

Has never previously enrolled at the graduate post-baccalaureate level in any program in any institution of higher education (although he may previously have been enrolled in a first-professional program).

## **FULL-TIME EQUIVALENT (FTE)**

The full-time equivalent total number of students is the sum of the full-time students plus the sum of the fractions of full-time represented by all of the part-time students. If the tuition and fee charges are precise reflections of the fraction of full-time load of study by the student, the FTE of the part-time students should be consistent (e.g., when the fees are \$X per credit hour); or the FTE may be calculated in terms of each part-time student's credit hour load as a fraction of the full-time load (this is the preferred and most accurate method); or, provided that the institution does not have a peculiar pattern of part-time enrollment, it may use the HEGIS Adjusted Head Count Method which consists of counting each part-time student as one-third FTE. (N.B.

Full-time students are counted as only one FTE; there is no student who is more than full-time or one FTE.)

### **FULL-TIME STUDENT**

A student who is registered for a number of courses or credits equal to at least 75% of a normal student load. The normal load for a student is the number of credit hours required for graduation or completion of his program, divided by the number of terms normally required for graduation or completion. As applied to graduate students a full-time student is one whose academic load—in terms of course work or other required activity—is at least 75% of that normally recommended for such students. Time spent by teaching or other activity is performed as a requirement for a degree. Employment which is not a part of the prescribed activity for an advanced degree should not be counted as part of the time spent on graduate work. In any event, any student paying less than full-time tuition and fees cannot be counted as a full-time student.

### **GRADE POINT AVERAGE (GPA)**

An honor point ratio calculated from the number of credits earned and the quality points assigned to grades received in college courses. A college where grading system is based on a 4-point scale, would probably assign quality points as follows:

#### *Sample Grading Scale*

A	=	4.00
B	=	3.00
C+	=	2.50
C	=	2.00
C-	=	1.50
D	=	1.00
F	=	None

#### *Sample Quality Points Earned*

English	A	=	4.00	x	3	credits	=	12.00	Q.Pts.
Math	B	=	3.00	x	3	credits	=	9.00	Q.Pts.
History	C	=	2.00	x	3	credits	=	6.00	Q.Pts.
Biology	B	=	3.00	x	5	credits	=	15.00	Q.Pts.
Total Quality Points								42.00	

Therefore, student's grade point average equals 42.00 Q.Pts./14 credits = 3.00 avc.age. For institutions whose grading system is not based on a 4.00 scale, the G.P.A. may be converted as follows:

$$\text{GPA} = \frac{4.00 \times \text{GPA of student based on institution's standards}}{\text{Highest possible GPA for institution}}$$

**GRADE POINT AVERAGE, CUMULATIVE**

Student's GPA based on all courses completed. Includes transfer points as well.

**GRADE POINT AVERAGE, CURRENT**

Student's GPA based only on those courses completed during the most recent school term.

**GRADE POINT AVERAGE, PREVIOUS COLLEGE**

The GPA earned by a transfer student at his former college.

**GRADUATING STUDENT, FUTURE PLANS**

Indicates the plans of a graduating student, whether they include employment or continuing education. Specify the type of employment in which student plans to engage or the college or university he plans to attend.

**HEAD-COUNT STUDENT**

Any individual considered by the institution to be a student without regard to the course load being carried. Includes both full-time and part-time students.

**HEGIS SUBJECT FIELD**

Standardized discipline specialty codes as described in *A Taxonomy of Instructional Programs in Higher Education* (Huff, Chandler, 1970). (See also: Section III., "Academic Disciplines. .," p. 21 and Appendix B.)

**HIGH SCHOOL, CLASS SIZE**

Total number of students in graduating class.

**HIGH SCHOOL, DATE OF GRADUATION**

Gives the month and year in which student graduated or will graduate from high school. If he does not have a high school diploma, give the date on which the GED was issued.

**HIGH SCHOOL, GRADUATING**

The full name and address of the high school from which student graduated. The institution may wish to code the high school according to the codes



prepared by the American College Testing Examination (ACT) and College Entrance Examination Board (CEEB) for high schools within the U.S.

#### **HIGH SCHOOL, GPA**

Student's grade point average (GPA) calculated on 4 years of high school course work, with 4.00 being the highest value.

#### **HIGH SCHOOL, RANK**

The position of a particular student with respect to his total graduating class; usually determined by GPA.

#### **IDENTIFICATION NUMBER (I.D.)**

A number used to identify each individual student in attendance at the institution. Social Security numbers are often used as I.D. numbers.

#### **INSTRUCTION TYPE**

The categorization of the methods by which organized instruction is conducted, reflecting educational technology and the use of the facilities, materials, and equipment. (See also: Section III., "Medium of Instruction," p. 35)

##### ***Lecture***

Formal presentation of a prepared discourse. Primarily, one-way communication.

##### ***Laboratory***

Instructor prepares and supervises the execution of investigations by the class.

##### ***Recitation/Discussion***

Two-way communication of the contents of course materials.

##### ***Seminar***

Students carry the major preparation responsibility for the class.

##### ***Independent Study***

Student or students work independently of the instructor but under his direction.

##### ***Programmed Instruction***

Contents of the course presented to the student through programmed materials, television, or other similar forms of presentation.

##### ***Other***

For methods of instruction not covered by the above categories.

## **MAJOR**

The degree program in which the student is enrolled. The student's primary field of emphasis.

## **MAJOR DEGREE FIELD**

A discipline division or discipline specialty in which a degree is offered. (See: Section III., "Academic Disciplines . . .," p. 21)

## **MARITAL STATUS**

Specify:

- Single—those never married, divorced, or widowed
- Married—those married and living with or separated from spouse

## **MATRICULATION DATE**

The date upon which student completes registration, thereby becoming officially enrolled in the institution. Indicate month, day, year.

## **MEDIUM OF INSTRUCTION**

### *Class*

A group formally organized for face-to-face instruction, which meets regularly but which has intervening time periods between meetings and which usually extends over an entire session or intersession.

### *Short Course*

Extends over a more limited time period than a class and may begin and end at any given time.

### *Correspondence Course and/or Independent Study*

A course of instruction involving exchange between instructor and student or an individual student program usually conducted by written communication and/or examination.

### *Lecture Series*

An activity consisting essentially of a series of public addresses that are often based on a theme.

### *Closed-Circuit TV Instruction*

Instruction mainly or entirely by TV with program preparation and distribution completely controlled by the institution.

### *Broadcast TV Instruction*

Instruction over commercial or educational TV channels which is available to the public but permits viewers the option of registering with your institution and meeting its requirements.

*Closed-Circuit Audio-instruction*

Instruction mainly or entirely over a closed circuit audio system controlled by the institution.

*Broadcast Radio Instruction*

Instruction broadcast over one of the radio stations available to the public but allows listeners to exercise the option of registering with your institution and meeting its requirements.

**MILITARY STATUS**

Designate current military status:

- Non-veteran (indicate selective service number and status)
- Reserve or National Guard
- Discharged
- Retired
- Active Duty

Military status is of declining importance; its principal importance is in the area of veterans' benefits.

**NAME OF PARENT, GUARDIAN, OR SPOUSE**

Legal name of parent, guardian or spouse responsible for the student.

**NAME (STUDENT)**

Student's legal name. Includes: Last name, first name, middle initial, maiden name.

**NON-GRADUATING STUDENT, FUTURE PLANS**

Information on student who does not plan to remain at current institution through graduation. Should include:

- Reason for withdrawal
- Name of college to which transferring
- Type of employment in which he will be engaged

**OCCUPATION**

For the student's history before enrollment, or recording the occupation of either parent, in a manner adaptable to Equal Employment Opportunity compliance reporting, the following categories and definitions may be utilized.

*Officials and Managers*

Occupations requiring administrative personnel who set broad policies, exercise overall responsibilities for execution of these policies, and direct individual departments or special phases of an organization's operations.

*Professional*

Occupations requiring either college graduation or experience of such kind and amount as to provide a comparable background.

*Technicians*

Occupations requiring a combination of basic scientific knowledge and manual skill that can be obtained through about 2 years of post high school education or through equivalent on-the-job training.

*Sales Worker*

Occupations engaging wholly or primarily in direct selling.

*Office and Clerical*

Includes all clerical-type work regardless of level of difficulty, where activities are predominantly nonmanual.

*Craftsman (Skilled)*

Manual workers of relatively high skill level having a thorough and comprehensive knowledge of the processes involved in their work. Exercise considerable independent judgment and usually receive an extensive period of training.

*Operatives (Semi-skilled)*

Workers who operate machines or processing equipment or perform other factory-type duties of intermediate skill levels that can be mastered in a few weeks and require only limited training.

*Laborers (Unskilled)*

Workers in manual occupations which generally require no special training. Perform elementary duties that may be learned in a few days and require the application of little or no independent judgment.

*Service Worker*

Workers in both protective and nonprotective service occupations.

*Homemaker*

One who manages a household; especially as a wife and mother.

**OPENING FALL ENROLLMENT**

The total number of students in the fall session as appears on the official institutional record and is reported in HEGIS.

**PART-TIME STUDENT**

A student who carries a course load or other institutionally-required assignment in his educational program that is less than the minimum load that

would be required to achieve a degree or other completion in the normal course, and who pays less than full-time tuition and fees.

#### **PHYSICAL DISABILITY**

Use an institutionally assigned code to identify a student's physical disability or handicap, such as blindness, deafness, etc.

#### **QUALITY POINT(S)**

Computed as follows: (The Numerical Equivalent of a Letter Grade) X (The Number of Credit Hours Attributed to the Course). Quality points are also known as honor points in some institutions.

#### **REGISTRATION, DATE**

Give the specific date of student's last registration, month, day, year.

#### **REGISTRATION, METHOD**

Indicates which period student registered: pre-registration, regular registration, or late registration. (Registration periods based on institution's standards.)

#### **REGISTRATION, STUDENTS**

As a verb, the procedure by which students are assigned to classes. In this sense, often interchangeable with enrollment; as a noun, the total number of course registrations by some aggregate such as department, program, student level, etc. In this context, one student will account for as many registrations as the number of courses in which he is enrolled.

#### **REGISTRATION, TYPE**

Indicates student's current registration status:

- First-time college student (new entrant)—one who is entering an institution of higher learning for the first time
- Transfer student
- Interinstitutional transfer student
- Special student (such as a non-degree or unclassified, student-at-large, etc.)
- Continuing student (one who was enrolled during the last regular term and who did not have to apply for readmission)
- Readmitted student
- Graduate or professional—first-time

### **RELIGIOUS PREFERENCE**

Identifies student's preferred religious faith, such as Baptist, Methodist, Catholic, Muslim, etc. This information should be optional and not required of student.

### **RESIDENT STUDENT**

Students who take their college work on the main campus or on a branch campus through the regular departments. The location of student living quarters and legal domicile are irrelevant to this distinction. Includes students in both day and evening session. (Section III., "Extension Student," p. 30)

### **ROOM AND BOARD**

The total amount paid by one student to reside in institutionally-owned housing and to be served meals provided by the institution. Room and board charges conventionally relate to three records:

- Room and board charge or rate for one student for one semester, quarter or term.
- Average room and board charge per student, per semester, quarter, or term. (This will differ from above, only if there is more than a single rate, as when there is more than one type of accommodation, or males and females pay different charges for different levels of service, etc.)
- Total income to the institution derived from room and board charges. (Included in auxiliary enterprise totals.)

Where the room and board rates charged to a student depend upon his legal residence, the above records should be maintained separately for in-state and out-of-state students. (See: Section III., "Fee Residency Status," p. 31)

### **SECTION**

A regularly scheduled meeting of a group of students enrolled in a course which represents less than the total instructional program of the course, either in that it is a duplicated meeting of less than the total number of students enrolled in the course, or in that it is concerned with a single educational procedure when the course utilizes more than one (e.g., lecture, laboratory, recitation), or both.

### **SEX**

Specify male or female.

### **SOCIAL SECURITY NUMBER**

Often used as I.D. number. (000-00-0000)

## **STUDENT AID**

Also generally referred to as financial aid or student financial aid; monetary assistance to the student to permit him to pay his tuition, fees, and sometimes other expenses up to the total living cost.

### *Scholarship*

A simple, lump-sum grant of money, which has no repayment requirement, often awarded for excellence or potential excellence of performance in the educational program of the institution with financial need often an additional criterion. Recipients of scholarships are not required to render service to the institution as a consideration of their awards, nor are they required to repay them.

### *Fellowship*

A nontaxable gift of money which often requires performance, usually on the graduate level, or research activity in the student's field of interest to further the student's educational program. Recipients are not required to render service to the institution as a consideration of these awards (except in the case of a teaching fellowship which is employment), nor are they required to repay them.

### *Work-Study Program*

Combines remunerative work with classroom education for the principal purpose of providing financial aid, but it may also have as a major objective the motivation to, and enrichment of, learning.

### *Loan*

Financial assistance with some requirement of repayment; there is a factor of unreimbursed assistance in most student loan programs with subsidization of administration, below-market interest, and even partial loan forgiveness under certain circumstances.

Student aid is conventionally disaggregated first on the basis of the numbers of students receiving aid which represents a dollar cost to the institution (no matter the source of such dollars), and by the annual dollar cost of each type of aid; both of these sets of data disaggregated, in turn, by the level of student plus such other data breaks (e.g. sex, racial/ethnic background) as may be meaningful for institutional planning and policy. If the various types of student aid (e.g. scholarships, work-study, loans, etc.) are aggregated separately, then the number of awards, which will vary from the number of students aided (one student may receive more than one type of aid) may be aggregated by type of award on an annual basis.

## **STUDENT CREDIT HOUR OF "OTHER" INSTRUCTION**

A unit of measure which represents one student engaged in an informally scheduled activity for which one hour credit will be granted upon successful

completion. Examples of informally scheduled activities are independent study and thesis work.

### **STUDENT CREDIT HOURS (SCH)**

A unit of measure which represents one student engaged in an activity for which one hour of credit toward a degree or other certificate will be granted upon successful completion. Total student credit hours for a course are calculated by multiplying the course credit hour value by the number of students enrolled in the course.

### **STUDENT EMPLOYMENT**

The average number of hours student is employed on a weekly basis.

### **STUDENT FAMILY INCOME**

Analysis of student aid policy and practice requires tabulation of the student's family income, distributed as follows:

- \$ 0 - 4 (thousand)
- 5 - 9
- 10 - 14
- 15 - 19
- 20 plus

The tabulation must distinguish between the student still under the authority of a parent or guardian who includes parental income in his response to the query, and the "liberated" student or student beyond the legal age of majority who is financially independent and includes only his personal or immediate family income in his response. There will be wide disparity in the ranges and distributions reported by these two groups.

### **STUDENT HOUSING**

The type of housing in which student resides while in attendance at current institution. Indicate:

- Campus housing—dormitories, university apartments, fraternity or sorority houses, other institutionally-owned or operated facilities.
- Non-campus housing—private homes, apartments, etc.

### **STUDENT LEVEL**

#### Lower Division

- Freshman—A student who has completed less than one-half of a 2-year, one-fourth of a 4-year, or one-fifth of a 5-year, undergraduate program which terminates in a degree or other evidence of completion; usually measured by number of credits earned as a proportion of the number of



credits required for graduation or completion. All undergraduate first-time students are freshmen; the reverse is not true.

- Sophomore—A student who has completed more than one-half but not all of a 2-year, more than one-fourth but less than one-half of a 4-year, or more than one-fifth but less than two-fifths of a 5-year, undergraduate program which terminates in a degree or other evidence of completion; usually measured by number of credits earned as a proportion of the number of credits required for graduation.

#### Upper Division

- Junior—A student who has completed more than one-half but less than three-fourths of a 4-year, or more than two-fifths but less than three-fifths of a 5-year, undergraduate program which terminates in a degree or other evidence of completion; usually measured by the number of credits earned as a proportion of the number of credits required for graduation.
- Senior—A student who has completed more than three-fourths but not all of a 4-year, or more than three-fifths but not all of a 5-year, undergraduate program which terminates in a degree or other evidence of completion; usually measured by the number of credits earned as a proportion of the number of credits required for graduation. (In 5-year programs, a student is considered a senior for his last 2 years. Many institutions with 5-year programs simply identify the year level of the student with ordinal numbers; first year, second year, third year, etc.)

#### Post-Baccalaureate

- First Professional—A student enrolled in a professional school or program which requires at least 2 or more academic years of college work for entrance and a total of at least 6 years for a degree. Students in programs requiring only 4 or 5 years beyond high school are considered undergraduates. Students enrolled in programs leading toward a master's degree are to be considered as graduates. It is recognized that a first professional student may not have a baccalaureate degree; the post-baccalaureate descriptor applies to the level of the degree, not the level of enrollment. HEGIS asks for separate data on first professional enrollments and degrees or completions in law, medicine, dentistry, theology, osteopathy, veterinary medicine, podiatry or chiropractic. (Students enrolled in a program for a second professional degree, such as an LLM or DD, are usually classified as graduate students.)

#### Graduate

A student who holds a baccalaureate or first professional degree, or equivalent, and is presently enrolled in a program which leads to a master's or higher degree. Often split into two categories:

- Graduate I—those enrolled for a master's degree or in the first year of a doctoral program.

- Graduate II—those enrolled in the second and succeeding years of a doctoral program.

#### *Unclassified*

A student not a candidate for any degree or other formal recognition of completion, or whose previous work cannot be, or is not yet, evaluated, either case preventing classification of the student's level:

#### *Post-Doctoral*

A student who holds a first professional or doctoral degree and who is pursuing additional studies, usually specifically organized for his field and level of previous training; which study program is often not at conventional class times or for conventional lengths of time. Usually not for credit.

### **STUDENT LOAD (CURRENT)**

Total number of credit hours student is currently pursuing.

### **STUDENT MAJOR**

The student's primary field of emphasis. The field of concentration may fall within a single department of instruction or may overlap several departments. (See also: Section III., "Academic Disciplines . .," p. 21)

### **STUDENT, NON-DEGREE CREDIT**

Students in vocational and technical programs which are normally terminal and result in a certificate, diploma or similar award or students in occupational programs which prepare them for immediate employment.

### **TRANSFER STUDENT**

A student who terminates his enrollment in one institution and subsequently enrolls in another, usually with advanced standing credit. The term is sometimes applied to students who transfer from one college to another within an institution. The total number of transfer students is conventionally disaggregated by the student level, sex, attendance status, or other characteristics of the students.

### **TUITION AND FEES**

Tuition is the most widely used term to denote the amount of money charged and collected by an institution for the instructional services that the institution provides to its students. While tuition is often considered one of the fees, more commonly a fee is a charge, other than tuition, for specific items or services such as application for admission, registration, matriculation, laboratory courses, activities, etc., not covered by, but often collected with, tuition.

Tuition and fees for a particular program refer to *required* payments. Tuition and fees conventionally relate to three records:

- Tuition and fee charge or rate to one student in a program for one semester, quarter, or term.
- Average tuition and fee paid, per student (or FTE student) in one or more programs per semester, quarter, or term.
- Total income to the institution derived from tuition and fees.

Where the rates of tuition and fees charged to a student depend upon his legal residence, the above records should be maintained separately for in-state and out-of-state students. (See also: Section III., "Fee Residency Status," p. 31 and Section V., "Tuition and Fees," p. 100.

#### **TYPE OF STUDENT**

- Resident (See: Section III., "Resident Student," p. 39)
- Extension (See: Section III., "Extension Student," p. 30)

#### **WEEKLY CONTACT HOURS**

The total number of hours per week per student a course is scheduled to meet. Since this term refers only to scheduled meetings, no Weekly Contact Hour values are attached to such unscheduled activities as independent study and thesis work.

#### **WEEKLY CONTACT HOURS OF CLASSROOM INSTRUCTION**

With regard to a single course, the number of hours per week per student this course is scheduled to meet in classroom facilities (lecture rooms, recitation discussion rooms, seminar rooms).

#### **WEEKLY CONTACT HOURS OF LABORATORY INSTRUCTION**

With regard to a single course, the number of hours per week per student the course is scheduled to meet in laboratory facilities.

#### **WEEKLY STUDENT HOUR (WSH)**

A unit of measures which represents 1 hour of instruction given to one student in 1 week.

#### **IV. Physical Facilities Data Elements**

This section deals exclusively with physical plant in all of its dimensions. Therefore, except in a few instances the word "facilities" is not used in order to escape redundancy. Where "facilities" is used in the section and index it is used for clarity only.

*Note:* The numbers in parentheses (XXX) after room descriptors are the codes used in the *Higher Education Facilities Inventory and Classification Manual*. A sequential listing of these codes may be found in Appendix D.

##### **ALTERATION OR CONVERSION AREA (060)**

Rooms that are temporarily out of use because they are being altered, remodeled, or rehabilitated at the time of the inventory.

##### **ANIMAL QUARTERS (570)**

A room that houses laboratory animals maintained for the institution for research and/or instruction purposes. This category includes rooms generally referred to as animal rooms, cage rooms, stalls, wards, and similar rooms that are used to house animals intended for use in class laboratories, non-class laboratories, special class laboratories, or individual study laboratories. Does not include areas for treatment of patient animals.

##### **ANIMAL QUARTERS SERVICE (575)**

A room that directly serves an animal care facility as an extension of the activities of that facility. The category includes rooms generally referred to as feed storage rooms, feed mixing rooms, cage washing rooms, and similar facilities such as surgery, casting, or instrument rooms. Does not include areas that directly serve areas used for the treatment of patient animals.

##### **APARTMENT (950)**

A complete living unit that is not a separate structure. This is the basic module or group of rooms designed as a complete housekeeping unit, i.e., contains bedroom(s), living room(s), kitchen, and toilet facilities. It is not intended that individual rooms be specifically identified within the apartment, but only that the total interior space be accounted for. This category includes apartments provided for faculty, staff, or students. Apartments need not be located in a residential building.

##### **APARTMENT SERVICE (955)**

A room or area that directly serves an apartment or group of apartments as an extension of the activities in that facility. This category includes laundry

rooms, mail rooms, linen closets, maid rooms, trunk storage rooms, and telephone rooms which serve apartment facilities.

#### **ARMORY (510)**

A room or area used by Reserve Officer Training Corps (ROTC) units. This category includes indoor drill areas, indoor rifle ranges, and special-purpose military science rooms. Classrooms, class laboratories, and offices in an armory are designated as such, even though they are located in an armory building.

#### **ARMORY SERVICE (515)**

A room that directly serves an armory facility as an extension of the activities of that facility. This category includes supply rooms, weapons rooms, coat rooms, etc. Classroom service rooms, class laboratory service rooms, and office service rooms are so classified even though they are located in an armory building.

#### **ASSEMBLY (610)**

A room designed and equipped for the assembly of large numbers of persons for such events as dramatic, musical, devotional, livestock judging, or commencement activities. This category includes rooms generally referred to as theaters, auditoriums, concert halls, arenas, chapels, and livestock judging pavilions. Seating area, stage, orchestra pit, chancel, arena, and aisles are included in assembly facilities. Assembly facilities may also serve instructional purposes to a minor or incidental extent. Assembly facilities that are used primarily for instructional purposes are classified as classrooms.

#### **ASSEMBLY SERVICE (615)**

A room that directly serves an assembly facility as an extension of the activities of that facility. This category includes check rooms, coat rooms, ticket booths, dressing rooms, projection booths, property storage, make-up rooms, costume storage, green rooms, control rooms, etc. Lobbies are nonassignable space classified as circulation area.

#### **ASSIGNABLE AREA**

The sum of all areas on all floors of a building assigned to, or available for assignment to, an occupant, including every type of space functionally usable by an occupant (excepting those spaces defined as custodial, circulation, mechanical, and structural areas). All assignable areas should be computed by measuring from the outside finishes of surfaces which form the boundaries of the designated areas. Does not include *unusable* areas having less than 6'6" clear head room. Included are space subdivisions for offices, classrooms, laboratories, seminar and conference rooms, libraries, file rooms, storage

rooms, etc., including those for special purposes (e.g., auditoriums, cafeterias, TV studios, faculty and student locker and shower rooms, maintenance and repair shops, garages), which can be put to useful purposes in accomplishment of the institution's mission. Deductions should be made for columns and projections necessary to the building.

#### **ASSIGNABLE SQUARE FEET**

For a single room, the sum of all areas located between the principal surface of the walls and partitions at or near floor level. Space occupied by alcoves, closets, and built-in shelves opening into and serving the room ordinarily should be included. Areas of columns, door-swings, and impaired headroom, and space occupied by heating devices should be ignored. If, however, any of these structural features constitutes a large loss of usable space, the area should be deducted from the square feet measurement of the room.

#### **ATHLETIC FACILITIES SPECTATOR SEATING (523)**

The seating area used by students, staff, or the public to watch athletic events. Included in this category are permanent seating areas in fieldhouses, gymnasiums, and natatoria. This category does not include temporary or movable seating areas. Stadium seating by definition is structural area.

#### **ATHLETIC/PHYSICAL EDUCATION (520)**

A room (or area) used by students, staff, or the public for athletic/physical education activities. Included in this category are rooms generally referred to as gymnasiums, basketball courts, handball courts, squash courts, wrestling rooms, swimming pools, ice rinks, indoor tracks, indoor "fields," and fieldhouses. No distinction by room use category is made on the basis of gymnasiums, swimming pools, etc.

#### **ATHLETIC/PHYSICAL EDUCATION SERVICE (525)**

A room that directly serves an athletic/physical education facility as an extension of the activities of that facility. Included in this category are rooms generally referred to as physical education locker rooms, shower rooms, coaches' rooms, ticket booths, dressing rooms, equipment supply rooms, first aid rooms, skate sharpening rooms, towel rooms, etc. This category does not include public toilet rooms.

#### **AUDIO/VISUAL, RADIO, TV (530)**

A room or group of rooms used for the production and distribution of audio/visual, radio, and TV materials, and for the operation of equipment for the communication of these materials. This category includes rooms generally referred to as TV studios, radio studios, sound studios, graphics studios, and

similar rooms. Studios used primarily as part of an instructional program to train students in communication techniques should be classified as class laboratories if scheduled, or as special class laboratories if not scheduled.

#### **AUDIO/VISUAL, RADIO, TV SERVICE (535)**

A room that directly serves an audio/visual, radio, or TV facility as an extension of the activities in that facility. Included in this category are rooms generally referred to as film library, tape library, control room, videotape recorder room, property storage, recording rooms, engineering maintenance rooms, darkrooms, preparation rooms, and equipment storage rooms. Control rooms, recording rooms, and similar facilities used primarily to train students in communication techniques should be classified as class laboratory service or special class laboratory service.

#### **AVERAGE ROOM UTILIZATION RATE (AvRUR)**

The average number of hours per week a group of rooms is scheduled for use.

$$\text{AvRUR} = \frac{\text{(Scheduled Weekly Room Hours)}}{\text{Number of Rooms}}$$

AvRUR includes only *scheduled* Weekly Room Hours (WRH). Other uses are included under Imputed Room Utilization Rate (IRUR). As a matter of convention, Average Room Utilization Rate is used with respect to the total number of classrooms (or class laboratories) in an institution (or for some aggregation of rooms with different Station Counts or of different types).

#### **AVERAGE SECTION SIZE (AvSS)**

The average number of students in a group of class sections. In facilities manuals, the Average Section Size is derived by dividing the total Weekly Student Hours (WSH) taught in a group of rooms by the total Weekly Room Hours (WRH).

$$\text{AvSS} = \frac{\text{(Total Weekly Student Hours)}}{\text{(Total Weekly Room Hours)}}$$

$$\text{AvSS} = \frac{\text{(WSH)}}{\text{(WRH)}}$$

#### **AVERAGE STATION OCCUPANCY RATIO (AvSOR)**

The average proportion of stations used when a group of rooms is scheduled for use. As a matter of convention, Average Station Occupancy Ratio is used with respect to the total number of classrooms (or class laboratories) in an

institution (or some aggregation of rooms with different Station Counts or of different types).

$$\text{AvSOR} = \frac{(\text{Scheduled Weekly Student Hours per Station})}{(\text{Scheduled Weekly Room Hours per Room})}$$

#### **AVERAGE STATION UTILIZATION RATE (AvSUR)**

The average number of hours per week the total number of Stations in a group of rooms is scheduled. As a matter of convention, Average Station Utilization Rate is used with respect to the total number of classrooms (or class laboratories) in an institution (or for some aggregation of rooms with different Station Counts or of different types).

$$\text{AvSUR} = \frac{(\text{Scheduled Weekly Student Hours})}{(\text{Number of Stations})}$$

also

$$\begin{aligned} \text{AvSUR} &= \frac{(\text{Average Room Utilization Rate})}{(\text{Average Station Occupancy Ratio})} \times \\ &= (\text{AvRUR} \times \text{AvSOR}) \end{aligned}$$

#### **BUILDING**

A roofed structure for permanent or temporary shelter of persons, animals, plants, or equipment.

#### **BUILDING CAPACITY**

Indicates the number and area of rooms within the building with respect to the number of persons that can be accommodated. The following factors are often required when determining the amount of financial aid to be allocated by local, State, and Federal government for construction/enlargement purposes.

- Number of Rooms
- Total Room Area (Square Feet)
- Area/Student

#### **BUILDING DATA**

Descriptive characteristics of a building such as gross area, assignable area, condition, ownership, estimated replacement cost, and year of construction.

#### **BUILDING INVENTORY**

A statistical description of buildings including both building and room data.



## **BUILDING PROGRAMMING**

The process by which that information is developed which concerns a proposed construction or renovation project and which is required as a prerequisite to the development of detailed design plans for the project. The required information normally consists of such things as detailed listings of the amounts of each type of space, basic design requirements, the functional relationships between the various program components and space units, site for the building, basic guidelines for building configuration and relationships to site utility requirements of the various space units, preliminary cost restraints, and a timetable.

## **CALCULATED CAPACITY OF A DINING FACILITY**

The number of diners that can be accommodated in a dining facility for any particular meal. Capacity is calculated by multiplying the designed seating capacity of the facility by the number of turnovers appropriate to the meal in question. (See also: Section IV., "Turnover," p. 75)

## **CENTRAL FOOD STORES (750)**

A central facility for the processing and storage of foods used in food facilities. This category includes food storage areas, lockers, cold rooms, refrigerators, meat processing areas, and similar facilities located in a central food stores building. Offices located in a central food stores building are so classified. Food storage areas, freezers, lockers, etc., not located in a central food stores building are classified as food facility service.

## **CENTRAL LAUNDRY (760)**

A central facility used for cleaning, washing, drying, and ironing linens, uniforms, etc. This category includes laundry rooms, drying rooms, ironing rooms, etc., located in a central laundry. Offices located in a central laundry are so classified. Laundry rooms, drying rooms, ironing rooms, etc., not located in a central laundry are classified as residential facilities or as service space to whatever type of facility they serve.

## **CLASS LABORATORY (210)**

A room used primarily by regularly scheduled classes that require special-purpose equipment for student participation, experimentation, observation, or practice in a field of study. A class laboratory is designed for and/or furnished with equipment to serve the needs of a particular discipline for group instruction in regularly scheduled classes. The design of and/or equipment in such a room normally limits or precludes its use for other disciplines. Included in this category are rooms generally referred to as teaching laboratories, instructional shops, typing laboratories, drafting rooms, band rooms, choral

rooms, (group) music practice rooms, language laboratories, (group) studios, and similar specially designed and/or equipped rooms *if they are used primarily for group instruction in regularly scheduled classes*. Computer processing rooms used primarily to instruct students in the use of Electronic Data Processing (EDP) equipment are classified as class laboratories in that instruction is conducted primarily in regularly scheduled classes. This category does not include laboratory rooms that serve as individual (or independent) study rooms. It does not include laboratories used for group instruction that are informally or irregularly scheduled. This category does not include rooms generally referred to as research (non-class) laboratories. It does not include gymnasiums, pools, drill halls, laboratory schools, teaching clinics, demonstration houses, and similar facilities included under special care facilities. Computer processing facilities used jointly for instruction and/or research and/or administration are data processing/computer facilities.

#### **CLASS LABORATORY CAPACITY**

The number of Weekly Room Hours (WRH) and Weekly Student Hours (WSH) which can be accommodated in an institution's class laboratory facilities.

#### **CLASS LABORATORY HOUR OF INSTRUCTION**

One hour spent by one instructional staff member in contact with a scheduled class laboratory section. Also referred to as a class laboratory Faculty Contact Hour. (Note that facilities manuals do *not* use the traditional term "contact hour" for the measurement of *student* time; they use the term "Weekly Student Hours".)

#### **CLASS LABORATORY SERVICE (215)**

A room that directly serves one or more class laboratories as an extension of the activities in those rooms. Included in this category are balance rooms, cold rooms, stock rooms, dark rooms, equipment issue rooms, and similar facilities that serve class laboratory, except animal rooms and greenhouses. This category does not include balance rooms, cold rooms, stock rooms, dark rooms, etc., that serve special class laboratories, individual study laboratories, or non-class laboratories. Rooms that provide housing for laboratory animals are classified as animal quarters. Greenhouses are separately categorized.

#### **CLASSROOM**

A room used by classes that do not require special-purpose equipment for student use. Included in this category are rooms generally used for scheduled instruction requiring no special equipment and referred to as lecture rooms, lecture-demonstration rooms, seminar rooms, and general purpose classrooms. A classroom may be equipped with tablet arm chairs (fixed to the floor,

joined together in groups, or flexible in arrangement), tables and chairs (as in a seminar room), or similar types of seating. A classroom may be furnished with special equipment appropriate to a specific area of study if this equipment does not render the room unsuitable for use by classes in other areas of study. This category does not include conference rooms, meeting rooms, auditoriums, or class laboratories. Conference and meeting rooms are distinguished from seminar rooms on the basis of primary use; rooms with tables and chairs that are used primarily for meetings (as opposed to classes) are conference rooms or meeting rooms. Auditoriums are distinguished from lecture rooms on the basis of primary use; a large room with seating oriented toward some focal point which is used for dramatic or musical productions, or for general meetings is an assembly facility (i.e., an auditorium normally used for purposes other than scheduled classes). A class laboratory is distinguished from a classroom on the basis of equipment in the room and by its limited use. A room with specialized equipment such as laboratory benches, typewriters, desk calculators, drafting tables, musical equipment (instructional), shop equipment, etc., that is used for instructional purposes is a class laboratory, a special class laboratory, or an individual study laboratory.

#### **CLASSROOM CAPACITY**

The number of Weekly Room Hours and Weekly Student Hours which an institution's classrooms can accommodate.

#### **CLASSROOM HOUR OF INSTRUCTION**

One hour spent by one instructional staff member in contact with a scheduled classroom course or section. Also referred to as a Classroom Faculty Contact Hour.

#### **CLASSROOM SERVICE (115)**

A room that directly serves one or more classrooms as an extension of the activities in such a room. Included in this category are projection rooms, cloak rooms, preparation rooms, closets, and storage if they serve as classrooms. This category does not include projection rooms, cloak rooms, preparation rooms, closets, or storage if such rooms serve laboratories, conference rooms, meeting rooms, assembly facilities, etc. A projection booth in an auditorium (not used primarily for scheduled classes) is classified as assembly facility service.

#### **CLASSROOM TYPE**

A term for a subdivision within the room type "Classroom." These subdivisions are designed to allow institutions to differentiate between such Classroom Types as lecture halls, general purpose classrooms, and seminar rooms.

### **CLINIC (NON-HEALTH PROFESSIONS) (540)**

A room used for the diagnosis and/or the treatment of patients in a program other than medicine (human or veterinary), dentistry, and student health care. Included in this category are rooms generally referred to as patient examination rooms, testing rooms, consultation rooms. Clinics are typically associated with such educational areas as psychology, speech and hearing, remedial reading, and remedial writing. This category does not include clinics for the medical or dental treatment of humans or animals.

### **CLINIC SERVICE (NON-HEALTH PROFESSIONS) (545)**

A room that directly services a clinic facility as an extension of the activities of that facility. Included in this category are waiting rooms, observation rooms, control rooms, records rooms, and similar supporting rooms. This category does not include rooms which serve health care facilities.

### **CONDITION**

The physical status and quality of the building at the time of the inventory, based on the best judgment of those responsible for campus development.

This building characteristic has the following categories:

#### ***Satisfactory***

Suitable for continued use with normal maintenance.

#### ***Remodeling—A***

Requires restoration to present acceptable standards without major room use changes, alterations, or modernizations. The approximate cost of "Remodeling A" is not greater than 25% of the estimated replacement cost of the building.

#### ***Remodeling—B***

Requires major updating and/or modernization of the building. The approximate cost of "Remodeling—B" is greater than 25%, but not greater than 50% of the estimated replacement cost of the building.

#### ***Remodeling—C***

Requires major remodeling of the building. The approximate cost of "Remodeling—C" is greater than 50% of the replacement cost of the building.

#### ***Demolition***

Should be demolished or abandoned because the building is unsafe or structurally unsound, irrespective of the need for the space or the availability of funds for a replacement. This category takes precedence over categories 1, 2, 3, and 4. If a building is scheduled for demolition, its condition is recorded as "Demolition," regardless of its condition.

### ***Termination***

Planned termination or relinquishment of occupancy of the building for reasons other than unsafeness or structural unsoundness, such as abandonment of temporary units or vacation of leased space. This category takes precedence over all other categories. If a building is scheduled for termination, its condition is recorded as "Termination," regardless of its condition.

### **CONFERENCE ROOM (OFFICE RELATED) (350)**

A room serving an office complex and used primarily for staff meeting and departmental activities other than instructional activities. A conference room may be equipped with tables and chairs, lounge-type furniture, straight back chairs, and/or table arm chairs. Normally, it is used by a specific organizational unit, whereas meeting rooms are used for general purposes such as community group meetings. It is distinguished from facilities such as seminar rooms, lecture rooms, and general classrooms because it is used primarily for activities other than scheduled classes. Rooms that serve both as conference rooms and meeting rooms should be classified according to their principal use. This category does not include classrooms, seminar rooms, lecture rooms, auditoriums, interview rooms, or lounge facilities.

### **CONFERENCE ROOM SERVICE (OFFICE RELATED) (355)**

A room that directly serves one or more conference rooms as an extension of the activities in those rooms. Included in this category are such rooms as kitchenettes, chair storage rooms, projection rooms, sound equipment rooms, etc. This category does not include kitchens, dining rooms, and similar facilities in a centralized conference-type building. Dining rooms open to the student body at large and/or the public are categorized as food facilities.

### **CONSTRUCTION AREA**

That portion of the gross area of a building which cannot be put to use because of the presence of structural features of the building. Areas of a building which cannot be assigned for use because they are necessary to the structure of the building. Such areas include walls, pipe tunnels and chases, elevator shafts, columns, and other structural elements.

### **DATA PROCESSING/COMPUTER (710)**

A room or group of rooms used for processing of data by computers. This category includes keypunch rooms, electronic data processing rooms, electronic computer rooms, and similar data processing areas. This category does not include rooms containing desk calculators, post-billing machines, check-writing machines, and similar office or office service rooms. It is recommended that the area occupied by a keypunch machine, sorter, or other electronic data processing equipment in a room otherwise classifiable as an

office not be prorated to this category. A data processing facility used only for instruction should be classified as a class laboratory, special class laboratory, or individual study laboratory. If a room, otherwise classifiable as an office, happens to contain a keypunch machine, sorter, or other small EDP equipment, do not prorate the area in that room, but rather classify the entire room as an office.

#### **DATA PROCESSING/COMPUTER SERVICE (715)**

A room that directly serves a data processing/computer facility as an extension of the activities in that facility. This category includes such rooms as card storage, paper form storage, tape storage, control rooms, plugboard storage, wiring rooms, equipment repair rooms, observation rooms, and similar service areas. This category does not include rooms for data processing personnel. These rooms are classified as offices.

#### **DEGREE OF PRIVACY**

An expression of the number of occupants assigned to an enclosed office; degree of privacy is expressed in terms of single, double, or multiple occupancy.

#### **DEMONSTRATION (550)**

A room (or group of rooms) used to practice the principles of certain disciplines such as teaching and home economics. This category includes demonstration schools, laboratory schools, preschool nurseries, etc., if the facilities support the training of the college-level students as teachers. This category includes home-management houses that serve to train college-level students in home economics. Demonstration schools, laboratory schools, preschool nurseries, and home management houses in which the student serve as the subjects for a research study are classified as nonclass laboratories. Rooms that serve nursery, elementary, or secondary school students (in a laboratory school or pre-school nursery) will not be classified as classroom, class laboratories, or offices, etc., but rather as demonstration facilities. However, classrooms or class laboratories in such facilities used primarily for college-level students should be so classified. Offices, conference rooms, and meeting rooms used by college-level staff should be so classified.

#### **DEMONSTRATION SERVICE (555)**

A room that directly serves a demonstration facility as an extension of the activities of that facility. Included in this category are facilities generally referred to as storerooms, laundry, etc., in a home demonstration facility, and has kitchen, lockers, shower rooms, etc., in a laboratory school. The distinction between a demonstration facility and demonstration facility service is somewhat arbitrary. In general, the primary activity areas such as kitchen,

dining room, living room (in a home demonstration house), or classrooms, laboratories, gymnasiums that serve nursery, elementary, or secondary school students (in a laboratory school) should be designated as demonstration facilities.

#### **DENTAL CLINIC**

A room used for the dental examination and/or dental treatment of humans.

#### **DENTAL CLINIC SERVICE**

A room which serves a dental clinic facility as a direct extension of the activities in such a facility. This category includes supporting dental laboratory services and other facilities which serve a dental clinic.

#### **DEPARTMENTAL INTEGRITY**

The assignment of the staff members of a single department to office facilities in reasonably close physical proximity.

#### **DESIGN CAPACITY**

The number of individuals which a facility is designed to accommodate at one time. The number of individuals a facility can accommodate when used in the manner originally intended.

#### **DESIGN DEVELOPMENT**

The process by which the general requirements of a building as expressed in the building program are translated into a detailed set of architectural plans. The output of the process is a detailed set of working drawings and specifications for construction of a building.

#### **DESIGNED SEATING CAPACITY**

The number of stations a room is designed to accommodate.

#### **ESTIMATED REPLACEMENT COST**

Determined in terms of the cost to replace the building's assignable floor area at current construction costs in accordance with current building codes, standard construction methods, and currently accepted practices and policies of the institution. The *Engineering News Record* is one frequently used source of information for determining construction cost indices. The replacement cost of fixed equipment in the building should be included.

**EXHIBITION (620)**

A room used for exhibition of materials, works of art, artifacts, etc., and intended for general use by students and the public. This category includes museums, art galleries, and similar exhibition areas. Collections not primarily for general exhibition, such as departmental displays of anthropological, botanical, or geological specimens, should be classified under an appropriate laboratory category.

**EXHIBITION SERVICE (625)**

A room that directly serves an exhibition facility as an extension of the activities of that facility. This category includes work rooms for the preparation of materials and displays, vaults or other storage for works of art, check rooms, etc. Research areas in museums are classified as nonclass laboratories or nonclass laboratory service.

**FACILITIES**

Any physical structures required by the institution for the performance of its programs and related activities. Included are parking areas, outdoor playing areas, buildings, parks, rooms, service areas, agricultural fields, and landscaped areas.

**FIELD BUILDING (560)**

A barn or similar structure for animal shelter or the handling, storage, and/or protection of farm products, supplies, and tools, and for field experiments. Field-service facilities include barns, animal shelters, sheds, silos, feed units, hay storage, and seedhouses. Greenhouses related to farm operations are included in this category. Structures are typically of light frame construction with unfinished interiors, usually but not exclusively related to agricultural field operations, and are frequently located outside the central campus area. Also included are such facilities as meteorological field test stations. Location of a building is not sufficient justification for classification as a field-service facility. Finished rooms such as endocrine research laboratories, dairy research laboratories, etc., should be classified as nonclass laboratory facilities.

**FOOD FACILITIES (630)**

A room used for eating food. This category includes dining halls, cafeterias, snack bars, restaurants, and similar eating areas, including such areas in residence halls, faculty clubs, etc. This category includes facilities which are open to the student body and/or the public at large. Areas intended primarily as food facilities, even though containing vending machines rather than serving counters, are included in this category. Rooms with vending machines other than for regular meal or snack service are classified as lounge facilities or merchandising facilities.



#### **FOOD FACILITIES SERVICE (635)**

A room that directly serves a food facility as an extension of the activities in that facility. This category includes such areas as kitchens, refrigeration rooms, freezers, dishwashing rooms, cafeteria serving, preparation, cleaning, etc., including such areas in residence halls.

#### **GREENHOUSE (580)**

A building or room, usually composed chiefly of glass and/or other light transmitting material, for the cultivation and/or protection of plants. Does not include greenhouses related to farm operations.

#### **GREENHOUSE SERVICE (585)**

A room that directly serves a greenhouse facility as an extension of the activities in that facility. Includes rooms generally referred to as headhouses. Does not include greenhouses related to farm operations.

#### **GROSS AREA**

The sum of the floor areas of the building included within the outside faces of exterior walls for all stories, or areas that have floor surfaces. Gross area should be computed by measuring from the outside face of exterior walls, disregarding cornices, pilasters, buttresses, etc., which extend beyond the wall face. Measured in terms of gross square feet (GSF). In addition to all the internal floored spaces obviously covered above, gross area should include basements (except unexcavated portions), attics, garages, enclosed porches, penthouses, mechanical equipment floors, lobbies, mezzanines, all balconies (inside or outside) utilized for operational functions, and corridors, provided they are within the outside face lines of the building. Roofed loading or shipping platforms are included, whether within or outside the exterior face lines of the building. Stairways, elevator shafts, and ducts are to be counted as gross area on each floor through which the shaft passes. Exclude open courts and light wells, or portions of upper floors eliminated by rooms or lobbies that rise above single-floor ceiling height.

#### **HEALTH CARE SERVICE (895)**

Rooms used for housekeeping, linen storage, and handling. Includes locker rooms, used by housekeeping staff for storerooms, closets, locker rooms, etc., for building maintenance and operation. Nonassignable areas are explicitly excluded from this category. Excludes mechanical and equipment areas.

#### **HEALTH FACILITY (STUDENT)**

A room for the medical examination or treatment of students. This category includes examination rooms, bedrooms, surgery rooms, and clinics.

#### **HEALTH FACILITY SERVICE SPACE (STUDENT)**

A room which directly serves a health facility (student) as an extension of the activities of such a facility. Included in this category are such rooms as dispensaries, record rooms, waiting rooms, clinical laboratories, scrub-up rooms, and linen closets.

#### **HOUSE (970)**

A complete living unit that is a separate structure. This is the basic module or group of rooms designed as a complete housekeeping unit, i.e., contains bedroom(s), living room(s), kitchen, and toilet facilities. It is not intended that individual rooms be specifically identified within the structure, but only that the total interior area be accounted for. This category includes houses provided for faculty, staff, or students.

#### **IMPUTED AVERAGE SECTION SIZE (IAvSS)**

The average number of persons occupying a room when the room is in use, either formally or informally. The quotient which results from dividing the Imputed Weekly Student Hours (IWSH) by the Input Weekly Room Hours (IWRH).

$$IAvSS = \frac{(IWSH)}{(IWRH)}$$

#### **IMPUTED ROOM UTILIZATION RATE (IRUR)**

The number of hours per week a special class laboratory or an individual study laboratory is used both formally and informally.

#### **IMPUTED STATION OCCUPANCY RATIO (ISOR)**

The proportion of occupied stations to available stations when a special class laboratory or an individual study laboratory is used both formally and informally.

### **IMPUTED STATION UTILIZATION RATE (ISUR)**

The number of hours per week the stations in a special class laboratory or in an individual study laboratory are used both informally and formally. The product resulting from multiplying the Imputed Room Utilization Rate (IRUR) by the Imputed Station Occupancy Ratio (ISOR)

$$\text{ISUR} = (\text{IRUR}) \times (\text{ISOR})$$

### **IMPUTED WEEKLY ROOM HOURS CAPACITY (IWRH<sub>c</sub>)**

The number of Imputed Weekly Room Hours (IWRH) that can be accommodated in rooms of each Station Count. The product of the number of rooms (R) of each Station Count and the Imputed Room Utilization Rate (IRUR) assumed for planning purposes for that Station Count.

$$(\text{IWRH}_c) = (R) \times (\text{IRUR})$$

### **IMPUTED WEEKLY ROOM HOURS (IWRH)**

The sum of the scheduled Weekly Room Hours (WRH) and the number of informally scheduled hours of room use. The quotient resulting from dividing the Imputed Weekly Student Hours (IWSH) by the product resulting from multiplying the number of Stations (N) by the Imputed Station Occupancy Ratio (ISOR). Informally scheduled hours may be a matter of record or may be estimated.

$$\text{IWRH} = \frac{(\text{IWSH})}{(N) \times (\text{ISOR})}$$

### **IMPUTED WEEKLY STUDENT HOURS CAPACITY (IWSH<sub>c</sub>)**

The number of Imputed Weekly Student Hours (IWSH) that can be accommodated in Rooms of each Station Count. The product of the number of Stations (N) in Rooms of each Station Count and the Imputed Station Utilization Rate (ISUR) assumed for planning purposes for that Station Count.

$$\text{IWSH}_c = (N) \times (\text{ISUR})$$

### **IMPUTED WEEKLY STUDENT HOURS (IWSH)**

The sum of any scheduled Weekly Student Hours (WSH) and the number of informally scheduled hours students are occupying the Stations in the room. Informally scheduled hours may be a matter of record or may be estimated. The product resulting from multiplying the number of Stations (N) by the Imputed Station Occupancy Ratio (ISOR) by the Imputed Weekly Room Hours (IWRH).

$$\text{IWSH} = (\text{N}) \times (\text{ISOR}) \times (\text{IWRH})$$

### **INACTIVE AREA (050)**

Rooms that are available for assignment to an organizational unit or activity but are unassigned at the time of the inventory. Rooms that are being modified or are not completed at the time of the inventory are so classified.

### **INDIVIDUAL STUDY LABORATORY (23)**

A room used primarily for individual student experimentation, observation, or practice in a particular field of study. Included in this category are music practice rooms, individual study laboratories, and similar rooms that serve a particular subject matter area. Stations may be grouped (as in an individual study laboratory) or individualized (as in a music practice room). This category does not include individual study facilities that are intended for general study purposes. Study areas not related to a specific area of study are classified as study facilities. Computer processing facilities used jointly for instruction and/or research and/or administration are classified as data processing/computer.

### **INDIVIDUAL STUDY LABORATORY SERVICE (235)**

A room that directly serves one or more individual study laboratories as an extension of the activities in those rooms. Included in this category are equipment storage rooms, stock rooms, and similar rooms which serve an individual study laboratory facility, except animal rooms and greenhouses. This category does not include rooms that serve class laboratories, special class laboratories, or nonclass laboratories. Rooms that provide housing for laboratory animals are classified as animal quarters. Greenhouses are separately categorized.

### **LABORATORY TYPE**

A term for homogeneous groups of facilities within the room type "Class Laboratory" (e.g., organic chemistry labs, introductory physics labs, architecture design studios, etc.)

## **LIBRARY**

A place in which books, manuscripts, musical scores or other literary and artistic materials are kept for faculty-student use.

## **LIBRARY PROCESSING FACILITY**

A room which serves a study room, stack room, or open-stack reading room as a supporting service to such rooms (e.g., storage, central catalog, waiting area). In facilities manuals, office and work station areas for library staff are treated separately for detailed analysis and projection, but may be part of the library processing facilities. Included in this category are areas generally referred to as card catalog, circulation desk, bookbinding, microfilm processing, and audio/visual playback equipment for distribution to individual study stations.

## **LOCKER ROOM (690)**

A room used for changing clothes and/or storing personal materials. Includes service rooms intended for student and/or staff use principally for storage of clothing and/or individual materials, e.g., physical plant locker rooms. Does not include physical education or intercollegiate athletics locker rooms and areas.

## **LOUNGE (650)**

A room used for rest and relaxation. A lounge facility is typically equipped with upholstered furniture, draperies, and/or carpeting, and may include vending machines. A lounge facility is distinguished from a conference room and a meeting room by its more informal atmosphere and its general public availability. A lounge area associated with a toilet is nonassignable space and classified as mechanical area. A room devoted wholly to vending machines is classified as a merchandising facility. Vending machine areas in food facilities are classified as food facility.

## **LOUNGE SERVICE (655)**

A room that directly serves a lounge facility, such as a kitchenette.

## **MEETING ROOM (680)**

A room used for a variety of nonclass meetings. A meeting room may be equipped with tables and chairs, lounge-type furniture, straight-back chairs, and/or tablet arm chairs. Although it may be assigned to a specific organizational unit, it is used primarily by groups for general purposes such as student senate, student government, community groups, and short term meetings conducted by an extension divisor. A meeting room is distinguished

from a conference room because conference rooms are considered part of an office complex and are generally used for staff meetings or other departmental nonclass activities. Rooms serving an office complex and used primarily for staff meetings are classified as conference rooms. Seminar rooms used primarily for scheduled classes are classified as classrooms.

#### **MEETING ROOM SERVICE (685)**

A room that serves a meeting room as an extension of the activities in that room. Included in this category are such rooms as kitchenettes, chair storage rooms, projection rooms, sound equipment rooms, etc. This category does not include such rooms as kitchenettes and chair storage rooms that serve conference rooms.

#### **MERCHANDISING FACILITIES (660)**

A room (or group of rooms) used to sell products or services. This category includes such rooms as bookstores, barber shops, post offices, dairy stores, student union "desks," and vending machine areas devoted wholly to vending machines. This category does not include dining rooms, restaurants, snack bars, and similar food facilities, or vending machine areas associated with food facilities or lounges. It does not include meeting rooms which are classified as conference facilities. Hotel and motel rooms are classified in the appropriate category of residential facilities.

#### **MERCHANDISING FACILITIES SERVICE (665)**

A room that directly serves a merchandising facility as an extension of the activities of that facility. Included in this category are rooms generally referred to as supply closets, sorting rooms, freezers, telephone rooms, and private toilets.

#### **MULTIPLE-FAMILY DWELLING FACILITY**

A duplex house, apartment building, or other multiple-unit dwelling for more than one family. This category includes student and faculty apartment buildings and duplex houses rented to staff and/or students.

#### **NONASSIGNABLE AREA**

That portion of the area of a building which is not available for assignment to building occupants, but which instead is necessary for the general operation of the building. By definition, nonassignable area consists exclusively of the following: circulation, custodial, mechanical, and structural areas.

#### ***Circulation Area***

That nonassignable portion of a building which is required for physical access to some subdivision of space whether directly bounded by partitions or not.

Should be computed by measuring from the inner faces of walls or partitions which enclose horizontal spaces used for such purposes. Deductions should not be made for columns and minor projections necessary to the building. Do not include *unusable* areas having less than 6'6" clear head room. Circulation space should include but not be limited to corridors, elevator shafts, escalators, fire towers, stairways, loading platforms, elevator lobbies, and tunnels and bridges. When determining corridor areas, only horizontal spaces required for *general* access should be included—not aisles which are used only for circulation within office suites, auditoriums, or other working areas. Deductions should not be made for columns and projections necessary to the building.

#### *Custodial Area*

That portion of the nonassignable area which is the sum of all areas of a building used for its protection, care, and maintenance. These areas should be measured from the inside surfaces of enclosing walls or permanent partitions. Deductions should not be made for columns or minor projections necessary to the building. Do not include *unusable* areas with less than 6'6" clear head room. Included should be such areas as trashrooms, guardrooms, custodial rooms, custodial locker rooms, and custodial supply rooms. This category should not include central physical plant shop areas, nor should it include special purpose storage or maintenance rooms, such as linen closets and maid rooms in residence halls.

#### *Mechanical Area*

That portion of the gross area designed to house mechanical equipment, utility services, and nonprivate toilet facilities. Mechanical area should be computed by measuring from the inner faces of the walls, partitions or screens which enclose such areas. Do not include *unusable* areas with less than 6'6" clear head room. Mechanical areas should include, but not be limited to, mechanical areas in central utility plants, air-duct shafts, boiler rooms, fixed mechanical and electrical equipment rooms, fuel rooms, mechanical service shafts, meter and communications closets, service chutes, stacks, and nonprivate toilet rooms (custodial and public). Deductions should not be made for columns and projections necessary to the building.

#### *Structural Area*

Structural area should be construed to mean that portion of the gross area which cannot be occupied or put to use because of the presence of structural features of the building. Precise computation of structural area by direct measurement is not contemplated under these definitions. Structural areas should generally be determined by assuming it to be the residual area after the assignable, circulation, custodial, and mechanical areas have been subtracted from the gross area. Examples of building features normally classified as structural area are exterior walls, fire walls, permanent partitions, and unusable areas in attics, basements, or comparable portions of a building.

## **NONCLASS LABORATORY**

A room used for laboratory applications, research, and/or training in research methodology that require special-purpose equipment for staff and/or student experimentation or observation. Included in this category are rooms generally referred to as research laboratories and research laboratory-offices. This category does not include rooms generally referred to as teaching laboratories, such as class laboratories, special class laboratories, or individual study laboratories.

## **NONCLASS LABORATORY SERVICE (255)**

A room that directly serves one or more nonclass laboratories as an extension of the activities in those rooms. Included in this category are balance rooms, cold rooms, stock rooms, dark rooms, etc., that serve a non-class laboratory, except animal rooms and greenhouses. This category does not include balance rooms, cold rooms, stock rooms, dark rooms, etc., that serve a class laboratory, a special class laboratory, or an individual study laboratory. Rooms that provide housing for laboratory animals are classified as animal quarters. Greenhouses are separately categorized.

## **NURSE STATION (830)**

A room or area used by nurses who are supervising and/or administering health care facilities. Included in this category are areas devoted to records charting, reception desks, admissions desks, and areas adjoining nurses stations, such as utility rooms, work-storage areas, formula preparation areas, medications areas, etc. Rooms that can be identified as offices should be so classified.

## **OCCUPANCY RATE**

The quotient obtained by dividing the number of occupants of a facility by the design capacity of the facility (normally used in reference to residential facilities and health care facilities).

## **OFFICE (310)**

A room used by faculty, staff, or students working at a desk (or table). An office typically is equipped with one or more desks, chairs, tables, bookcases, and/or filing cabinets. Included in this category are rooms generally referred to as faculty offices, administrative offices, clerical offices, graduate assistant offices, teaching assistant offices, student offices, etc. Included in this category is a studio (music, art, etc.) if that room also serves as the office of a staff member. Special note should be taken of rooms which are equipped both as office and "research laboratory." A room equipped with laboratory benches, specialized scientific equipment, and/or such utilities as gas, water,



steam, air, etc., is classified as a nonclass laboratory. Note that this distinction rests on equipment rather than function. It is recommended that those rooms that have office-type equipment and fixed laboratory-type equipment (primarily in the biological and physical sciences) within the same room be classified as nonclass laboratories. Large rooms, such as glass shops, printing shops, reading rooms, research laboratories, etc., that incidentally contain a desk space for a technician or staff member are classified according to the primary purpose of the room, rather than as offices.

#### **OFFICE SERVICE (315)**

A room that directly serves an office or group of offices as an extension of the activities in those rooms. Included in this category are file rooms, mimeograph rooms, vaults, waiting rooms, interview rooms, closets, private toilets, records rooms, and office supply rooms. Centralized mimeograph and printing shops that are campus-wide in scope should be classified as shop facilities.

#### **ONE-FAMILY DWELLING FACILITY**

A house provided for one family. This category includes houses provided for, and/or rented to, staff or students.

#### **OPEN STACK**

A library stack area which is freely open and accessible to library users without restriction.

#### **OPEN STACK READING ROOM (430)**

A room that is a combination of a reading room and stack, generally without physical boundaries between the stack and reading areas. Included in this category are rooms generally referred to as open stack reading rooms. This category is not used if the area of an open stack reading room can be prorated to reading room and stack at the time the physical inventory is made. This category might be used as a "working-purposes" category if proration on some appropriate basis is anticipated.

#### **OPERATING DAYS**

The number of days per year that a facility (e.g., residence hall, dining facility, infirmary) is available for use.

#### **OTHER (590)**

A category of last resort. This category is included only as a category of last resort to be used to account for and classify those facilities that cannot be

described, even approximately, with other codes and definitions. This category should have very limited use if it is used at all.

### **OWNERSHIP**

The agency with which the title to the building rests. Use the following categories:

- Owned in fee simple.
- Title vested in the institution and being paid for on an amortization schedule (regardless of whether the building is shared with another institution or organization).
- Title vested in a holding company or building corporation to which payments are being made by the institution; title will ultimately pass to the institution. (Includes lease-purchase arrangements)
- Not owned by the institution, but leased or rented to the institution at a typical local rate.
- Not owned by the institution, but made available to the institution either at no cost or at a nominal rate.
- Not owned by the institution, but shared with an educational organization that is not a postsecondary institution.
- Not owned by the institution, but shared with another postsecondary educational institution.
- Other (e.g., not owned by the institution, but shared with a noneducational institution).

### **PATIENT BATH (820)**

A room containing patient bath and toilet facilities. Included in this category are toilet-bath facilities adjoining or in conjunction with patient bedrooms. Public toilet facilities are excluded.

### **PATIENT BED-DAY CAPACITY**

The product obtained by multiplying the number of available hospital or infirmary beds by the number of days per year that the hospital or infirmary will be available for use (365 in instances of year-round operation and a lower number when the facility is closed for summer months and/or other vacation period).

### **PATIENT BEDROOM (810)**

A room equipped with a bed and used for patient care. This category includes general nursing care, acute care, semiconvalescent/rehabilitative adult or pediatric bedrooms, intensive care units, infant care nurseries, incubator units, wards, etc. Connected clothes closets are included. Stalls for animal patients are also included.

#### **PHYSICAL PLANT FACILITY**

Facilities required for physical plant maintenance, operations, and construction activities. Includes shop facilities, shop facilities service, vehicle storage, vehicle storage service.

#### **PROCESSING ROOM (440)**

A room which serves a reading/study room, stack, or open stack reading room as a supporting service to such rooms. Included are areas generally used to house card catalogs, circulation desks, bookbinding, microfilm-processing, and audio/visual record-playback equipment for distribution to individual study stations. This category does not include such library space as offices for staff; acquisitions work areas that are to be classified as offices; campuswide or centralized audio/visual preparation areas, bookbinding, and microfilm-processing areas that are to be classified as shop facilities; instructional facilities for library science staff that are to be classified as classrooms, class laboratories, special class laboratories, offices, or other appropriate designations.

#### **PUBLIC WAITING (880)**

A room used by the public to await admission, treatment, or information. Included are lobbies, waiting and reception areas, visiting areas, and viewing areas. Lounges are excluded from this category.

#### **READING/STUDY ROOM (410)**

A room used by individuals to study books or audio/visual materials. Included in this category are rooms generally referred to as library reading rooms, carrels, study rooms, individual study stations, study booths, and similar rooms that are intended for general study purposes. Study stations may be grouped (as in a library reading room) or individualized (as in a carrel). Study stations in a reading room may include typewriters, remote terminals of a computer, electronic display equipment, etc. Reading rooms need not be located only in libraries but also may be found in residence halls or academic buildings. This category does not include individual study laboratories that are limited in use to a particular area of study. This category does not include classrooms, class laboratories, special class laboratories, nonclass laboratories, offices, sleep/study rooms in residence halls or other housing units, waiting rooms, or lounge facilities.

#### **RECREATION (670)**

A room used by students, staff, and/or the public for recreational purposes. This category includes such rooms as bowling alleys, pool and billiards rooms, ping pong rooms, ballrooms, chess rooms, card-playing rooms,

(noninstructional) music listening rooms, and hobby rooms. It does not include gymnasiums, basketball courts, handball courts, squash courts, wrestling rooms, swimming pools, ice rinks, indoor tracks, indoor fields, or fieldhouses that should be classified as athletic/physical education facilities. It does not include outdoor facilities such as tennis courts, archery ranges, fields, (football, hockey, etc.) or golf courses.

#### **RECREATION SERVICE (675)**

A room that directly serves a recreation facility as an extension of the activities in that facility. This category includes storage closets, equipment issue rooms, cashiers' desks, and similar rooms. It does not include athletic/physical facility service such as locker rooms, shower rooms, ticket booths, dressing rooms, and other similar service areas.

#### **RESEARCH FACILITY**

A facility which houses investigative or scholarly activities.

#### **ROOM**

A walled or partitioned portion of space within a building or other structure.

#### **ROOM DATA**

Descriptive characteristics of assignable interior spaces of a building, including standard room-use categories, institutional organizational units, standard programs and program category codes, assignable floor areas, and (in some instances) number of stations.

#### **ROOM TYPES**

Categories of rooms in accordance with the HEGIS facilities classification system. In the revised *Higher Education Facilities Inventory and Classification Manual*, the term, "Room Use" has been substituted for "Room Type." This modification involves little more than a change in titles because most of the original definitions were in terms of room use.

#### **ROOM UTILIZATION**

Indicates the amount of time a specific room is being used, the number of classes held within and the number of students occupying the room over a given period of time. Includes:

- Hours used and the percentage hours representative of the total hours available
- Number of classes
- Number of students

### **ROOM UTILIZATION RATE (RUR)**

The number of hours per week a room is scheduled for use. As a matter of convention, the RUR is used in conjunction with classrooms (or class laboratories) with the same range of station counts and of the same classroom or class laboratory use.

### **SECTION**

A group of students assembled for instruction in a regularly scheduled meeting of a course.

### **SECTION SIZE (SS)**

The number of individuals enrolled in (assigned to) a section of a scheduled or organized course.

### **SERVICE LABORATORY (860)**

A room used to provide diagnostic support services to health care facilities. Includes rooms generally referred to as pathology labs, pharmacy labs, autopsy labs, etc., such as hematology, chemistry tissue, bacteriology, serology, blood bank, basal metabolism, isotope, and rooms which serve service laboratories as a direct extension of the activities of such a facility, such as rooms generally referred to as cadaver storage/morgue, autoclave and centrifuge rooms, warm and cold rooms. This category does not include class laboratories, special class laboratories, or other facilities used primarily for organized instruction.

### **SHOP (720)**

A room used for the manufacture, repair, or maintenance of products or equipment. This category includes such rooms as carpenter shops, plumbing shops, electrical shops, painting shops, and similar physical plant maintenance facilities. It also includes central printing and duplication shops and campus-wide or centralized audio/visual preparation areas. This category does not include instructional shops; industrial arts and vocational-technical shops used for instruction should be classified as class laboratories. Materials preparation areas in audio/visual, radio stations, and TV studios should be so classified. Engineering drafting rooms serving the physical plant operation are classified as offices. Blueprint storage rooms are classified as office service.

### **SHOP SERVICE (725)**

A room that directly serves a shop facility as an extension of the activities in that facility. Included in this category are tool supply-storage rooms, materials storage rooms, and similar equipment or material supply and/or storage rooms. Locker rooms, shower rooms, lunch rooms, and similar nonpublic areas that

serve the shop facility should be included. This category does not include service areas related to class laboratories or nonclass laboratories. It does not include vehicular repair facilities (garages) that are classified as vehicle storage facility service. Blueprint storage rooms should be classified as office service.

#### **SLEEP/STUDY SERVICE (935)**

A room (or group of rooms) which directly serve the occupants of an individual sleep/study room with or without toilet/bath. This category includes mail rooms, laundry and pressing rooms, linen closets, maid rooms, serving rooms, trunk storage rooms, and telephone rooms which serve the occupants of sleep/study facilities. This category does not include food facilities, central laundry, or central food stores, toilet/bath, lounge facilities, recreation or activity areas, or nonassignable building service areas.

#### **SLEEP/STUDY WITH TOILET/BATH**

One or more rooms for individual(s), typically furnished with bed(s), wardrobe(s), desk(s), and chair(s), without an internally connected bath. This category includes single or multiple sleep/study rooms with bath facilities internal to the suite. A sleep/study facility may be a room for combined sleep/study, a room exclusively for sleeping, or a room for living/study, and includes connected closets. Study rooms for general use, available and open to the dormitory residents at large, and not part of bedroom or sleeping room suites, should be classified as reading/study. Residential quarters equipped with cooking facilities are coded as apartments. Separate food preparation rooms serving sleep/study areas, including small kitchens used by the occupants, are coded as food facilities service.

#### **SLEEP/STUDY WITHOUT TOILET/BATH (910)**

One or more residential rooms for one or more individual(s) typically furnished with bed(s), wardrobe(s), desk(s), and chair(s), without an internally connected bath. This category includes single or multiple sleep/study rooms. A sleep/study facility may be a room for combined sleep/study, a room exclusively for sleeping, or a room for living/study, and includes connected closets. Study rooms for general use, available and open to the dormitory residents at large, and not part of bedroom or sleeping room suites, should be classified as reading/study. Residential quarters equipped with cooking facilities are coded as apartments. Separate food preparation rooms serving sleep/study areas, including small kitchens used by the occupants, are coded as food service.

#### **SPACE AVAILABILITY**

Indicates the accessibility of a particular area.

- Assignable area
- Unassignable area

## **SPACE FUNCTION**

Indicates the activity for which the room is used.

- Instruction
- Research
- Public service
- Library
- General Administrative and institutional service
- Auxiliary services
- Noninstitutional agencies

## **SPECIAL CLASS LABORATORY (220)**

A room used primarily by informally (or irregularly) scheduled classes that require special-purpose equipment for student participation, experimentation, observation, or practice in a field of study. A special class laboratory is designed for and/or furnished with equipment to serve the needs of a particular study area for group instruction in informally (or irregularly) scheduled classes. The design and/or equipment in such a room normally limits or precludes its use for other study areas. Special class laboratories typically (but not necessarily or exclusively) include such rooms as language laboratories, (group) music practice rooms, (group) studios, etc., if they are used primarily for group instruction in informally (or irregularly) scheduled classes. Note that the criteria for differentiation between special class laboratories and class laboratories is the irregular or informal nature of the scheduling, and *not* the specialization of the equipment or instruction. This category does not include class laboratories, individual study rooms, and research (nonclass) laboratories. It does not include gymnasiums, pools, drill halls, laboratory schools, teaching clinics, demonstration houses, and similar facilities that are included under special use facilities. Computer processing facilities used jointly for instruction and/or research and/or administration are classified as data processing/computer.

## **SPECIAL CLASS LABORATORY SERVICE (225)**

A room that directly serves one or more special class laboratories as an extension of the activities in those rooms. Included in this category are tape storage rooms, equipment storage rooms, stock rooms, and similar rooms which serve a special class laboratory, except animal rooms and greenhouses. This category does not include rooms that serve class laboratories, individual study laboratories, or nonclass laboratories. Rooms that provide housing for laboratory animals are classified as animal quarters. Greenhouses are separately categorized.

## **STACK (420)**

A room (or portion of a room) used to provide shelving for library or audio/visual materials. Included in this category are rooms generally referred

to as library stacks. This category does not include bookshelf space in classrooms, laboratories, or offices. Audio/visual film and tape libraries that generally serve groups (rather than individuals) are classified as audio/visual, radio, TV facilities. Separate tape storage rooms for language laboratories should be classified as special class laboratories service or individual study laboratory service. Separate rooms containing musical scores, records, and tapes are classified as stack space if the primary purpose of the materials is for instruction or research (as in a library in a music building). Rooms containing such materials and intended for listening enjoyment (as in a student union) should be classified as recreation facility service.

#### **STANDARD ROOM USE CLASSIFICATION**

The classification of room facilities by intended usage rather than by room type.

#### **STATION**

The total facilities necessary to accommodate one person for one time period. The time period varies for different types of facilities. For example, when discussing classroom stations, the period of time may be one hour or class period, and when dealing with office stations the time period may be one year (or it may be indefinite).

#### **STATION COUNT (SC)**

The number of stations in a room.

#### **STATION OCCUPANCY RATIO (SOR)**

The proportion of stations used when the room is scheduled for use. As a matter of convention, the term Station Occupancy Ratio is used in connection with classrooms (or class laboratories) with the same Station Count and of the same type.

$$\begin{aligned} \text{SOR} \\ \text{[Station Occupancy Rate]} &= \frac{\text{WSH [Weekly Student Hours] per station}}{\text{WRH [Weekly Room Hours] per room}} \\ &= \frac{\text{SUR [Station Utilization Rate]}}{\text{RUR [Room Utilization Rate]}} \end{aligned}$$

#### **STATION UTILIZATION RATE (SUR)**

The number of hours per week a Station is scheduled for use. As a matter of convention, the term Station Utilization Rate is used in conjunction with classrooms or class laboratories with the same Station Count and of the same type.



$$\text{SUR} = \frac{(\text{Scheduled WSH})}{(\text{Number of Stations})}$$

also

$$\text{SUR} = (\text{Room Utilization Rate}) \times (\text{Station Occupancy Ratio})$$

$$\text{SUR} = (\text{RUR}) \times (\text{SOR})$$

### **STORAGE (730)**

A room used to store materials. Classification of a room as a storage facility is limited by definition to a central storage facility (warehouse) and inactive departmental storage. Storage related to other types of space follows the classification of the special type with a "service" designation. For example, a storage closet for office supplies is classified as office service. The distinction between the "service" and "storage" classifications rests on the possibility of physical separation of the materials stored. If the materials being stored could be placed in a warehouse, implying only occasional demand for the materials, then storage facility is the appropriate classification. Storage that must be close at hand because of the nature of the materials stored and the demands placed upon them by the program should be classified in the appropriate "service" category.

### **STORAGE SERVICE (735)**

A room that directly serves a storage facility and providing quick and easy access to materials. An example would be a room containing writing materials.

### **STUDY SERVICE (455)**

A room which directly serves reading/study rooms, stacks, open stack reading rooms, or processing rooms as a direct extension of the activities in those rooms. Other categories in these definitions have provided a "service" category for each type of room. Because such facilities are minimal in library-type spaces this one category of study facility service space is provided for all types of study facilities. Included are such areas as closets, locker space, coatrooms, etc. This category does not include card catalogs, circulation desks, and other areas designated as processing rooms.

### **SUPPLIES (870)**

A room used to store supplies for health care facilities. Central supply, pharmacy supplies/storage and dispensary, miscellaneous storage of a relatively inactive nature, other than that included in other primary and service room types.

### **SURGERY (840)**

A room used for surgery. Included in this category are major and minor surgery rooms, delivery rooms, special procedures operating rooms, and rooms used in conjunction with and as a direct extension of the activities of a surgery room such as labor rooms, recovery rooms, monitoring/observation rooms, special support equipment rooms, (e.g., anesthesia, heart, lung, x-ray, etc.) dictation booths, scrub-up areas, instrument clean-up and storage, gurney storage, sterile supplies storage.

### **TOILET/BATH (919)**

A toilet and/or bathroom intended to be used only by the occupants of the residential facilities, rather than by the general public. This category includes *common* or *shared* bathroom facilities which may consist of full or half-baths, showers, or toilet and shower combinations used by the residents, and accessible from a corridor or other general circulation area. This category does not include public rest rooms. Bathrooms internal to a sleep/study room, apartment, or house are included in their respective categories.

### **TREATMENT (850)**

A room used for diagnostic and therapeutic treatment. Included are rooms used for radiology, fluoroscopy, angiography, physical therapy, dialysis, cardiac catheterization, pulmonary function/vascular testing, EEG, EMG, combined doctor's office and examination/treatment rooms, and rooms which support treatment rooms as a direct extension of the activities of such a facility such as dressing rooms, film processing and viewing rooms, work preparation rooms, and special equipment storage.

### **TURNOVER**

The number of times a typical station can be used during a specified period of time. The average number of times that a typical dining station can be used during the course of serving a particular meal. The ratio between the number of diners that can be accommodated in a facility for a single meal and the number of dining stations available in that facility. Also calculated by dividing the length of the serving period for the meal by the shortest comfortable (or average) eating time for that meal.

### **TYPE OF OCCUPANT**

One possible parameter on which office assignments are based. The title, position, or rank of persons requiring office space which in terms of institutional policy are used to differentiate between amounts and types of office space assigned.

### **UNCLASSIFIED FACILITIES (000)**

- Inactive area
- Alteration of conversion area
- Unfinished area

### **UNFINISHED AREA (070)**

All potentially assignable areas in new buildings or additions to existing buildings that are not completely finished at the time of the inventory. This category is intended only for the unfinished part of a building or addition. The parts that are in use should be classified elsewhere.

### **UNIT FLOOR AREA**

Assignable square feet of space required per unit of space demand.

### **UNIT FLOOR AREA CRITERIA**

The quantitative value associated with the number of assignable square feet required per unit of space demand (station, occupant, FTE, etc.) for various types of facilities.

### **UTILIZATION ASSUMPTIONS REQUIRED**

A listing of various assumptions regarding utilization or occupancy rates which must be expressed quantitatively prior to application of the methodologies contained in facilities manuals. These assumptions, expressed in quantitative terms, define institutional policies for the facilities planning process.

### **UTILIZATION CRITERIA**

Quantitative values associated with utilization assumptions.

### **VEHICLE STORAGE FACILITY (740)**

A room or structure that is used to house and/or store vehicles. This category includes parking structures and other rooms and buildings generally referred to as garages, boat houses, airport hangars, and other storage areas for vehicles (broadly defined). This category does not include portions of barns or similar field building facilities that are used to house farm implements. Uncovered exterior parking areas are excluded.

### **VEHICLE STORAGE FACILITY SERVICE (745)**

A room or structure used to service vehicles. This category includes any area associated with a vehicle storage facility that is used for maintenance and repair of automotive equipment, boats, airplanes, and similar vehicles. This category does not include service areas that serve building maintenance and repair, and that are classified as shop facilities.

## **VETERINARY FACILITIES**

Veterinary facilities are grouped with human health care facilities, but are distinguished from animal quarters.

## **WEEKLY ROOM HOURS (WRH)**

The number of hours a week a room is used for scheduled activities required for the courses in the schedule of courses. (Frequently but not necessarily equal to weekly contact hours).

## **WEEKLY ROOM HOURS CAPACITY (WRHc)**

The number of Weekly Room Hours that can be accommodated in rooms of each station count. The product of the number of Rooms (R) of each Station Count and the Room Utilization Rate (RUR) for that station count assumed for planning purposes.

$$(WRHc) = (R) \times (RUR)$$

## **WEEKLY STUDENT HOUR (WSH)**

A unit of measure which represents one hour of instruction given to one student in one week.

## **WEEKLY STUDENT HOUR CAPACITY (WSHc)**

The number of weekly student hours that can be accommodated in rooms of each station count. The product of the number of stations (N) in rooms of each station count and the Station Utilization Rate (SUR) assumed for planning purposes for that station count.

$$(WSHc) = (N) \times (SUR)$$

## **WEEKLY STUDENT HOUR OF CLASSROOM INSTRUCTION**

A unit of measure which represents one hour of instruction given to one student in one week in classroom facilities (lecture rooms, recitation discussion rooms, seminar rooms, etc.)

## **WEEKLY STUDENT HOUR OF LABORATORY INSTRUCTION**

A unit of measure which represents one hour of instruction given to one student in one week in class laboratory facilities.

### **WEEKLY USER HOURS**

A unit of measure which represents one hour of activity engaged in by one individual for one hour during a week. In the *Higher Education Facilities Planning and Management Manuals*, Weekly user hours is used in place of the more common term Weekly Student Hours whenever the users of the facilities are not strictly students. The term weekly user hour is used primarily with regard to athletic physical education facilities where faculty, staff, and residents of the surrounding community as well as students may be users of the facilities.

### **YEAR OF CONSTRUCTION**

The calendar year in which the original building was completed regardless of any later date of occupancy, as in case of leased or rented building.

## V. Financial Data Elements

### ACCOUNTS PAYABLE AND ACCRUED EXPENSE(S)

Liabilities for goods received and other expenses incurred for which disbursements have not been made as of the date of the report.

#### *Accounts Payable*

- Vendors
- Miscellaneous unclassified

#### *Accrued Withheld Payroll Tax*

- Federal Income Tax
- FICA (Social Security)
- State

#### *Other Accruals*

- Sales tax collected
- TIAA Accrued and collected
- Group insurance premiums
- Hospital insurance premiums

### ACCOUNTS RECEIVABLE

Governmental appropriations and advances that are subject to release by a government officer for institutional use. Includes unpaid student accounts.

#### *Students*

- Students General
- Students Former
- Student Credit Balances Active
- Student Credit Balances Inactive
- Student Accounts Doubtful (Reserve)

#### *Faculty and Staff*

- Faculty-Staff General
- Faculty-Staff Purchases
- Faculty-Staff Meals
- Advances against Salaries
- Miscellaneous Deductions
- Travel Advances

#### *Donors*

- Due from Rockefeller Fund
- National Science Foundation
- Federal Government

*Other*

- Laundry Services
- U.S. Government NDEA
- Miscellaneous, Returned checks, etc.

**ACCRUAL ACCOUNTING**

The basis of accounting and reporting under which revenues are reported when they become due, even though they are received in a subsequent fiscal period; likewise, expenditures for the cost of all materials received and services rendered to an institution are reported even though payments for them may not yet have been made as of the date of the financial report.

**ADDITIONS**

Includes all additions to institutional assets during the reporting period. Therefore, it would not include those increases in particular fund balances which result from transfers between funds. Additions to fund balances should be reported on a total receipts basis (as defined by accrual accounting) for each fund group. Therefore, "additions" to current fund-restricted reflects the total receipts in current fund-restricted and will *not* equal the restricted "revenues" total for the current fund.

**AGENCY FUNDS**

Funds received and held by an institution as custodian or fiscal agent for others.

**ALLOWANCE FOR DOUBTFUL ACCOUNTS**

Percentage of the total accounts receivable which is allowed for bad debts.

**ALLOWANCE FOR DOUBTFUL LOANS**

Same as above.

**ANNUITY AND LIFE INCOME FUNDS**

These funds are acquired by an institution subject to an agreement whereby assets are donated.

**ASSETS**

Includes lands, buildings, machinery, stock, cash, investments, etc., anything owned that holds some monetary value. (See also: Section V., "Fund Balance Accounts," p. 88)

***Annuity and Life Income Funds***

Assets which consist of cash securities and other types of investments.

***Current Funds Restricted***

Funds or income restricted by outside agencies or persons as to use; earmarked for a specific purpose or use.

***Endowment and Similar Funds***

Comprise cash and investments.

***Loan Funds***

Commonly include cash, notes receivable for loans granted and perhaps temporary investments of cash on hand.

***Plant Funds for Renewals and Replacements***

Include land, buildings, improvements other buildings, and equipment.

***Plant Funds - Unexpended***

Include cash, investments, and receivables, etc.

**AUXILIARY ENTERPRISES**

Entities which exist to furnish a service not directly related to the academic process to students, faculty, or staff, and which charge a fee that is directly related to the cost of the service.

***Fee Income Auxiliary Operations***

- Nursery School
- Children's Dance
- Student Lodger
- Student Boarding
- Laundry
- Health and Recreation

***Income Faculty Auxiliary Operation***

- Dormitory Faculty Rental

***Sales Admissions Auxiliary Enterprises***

- Summer Dance Income
- Guest Rental Dormitories
- Direct Sales Dining Hall
- Laundry Service
- Snack Shop
- Health Services



*Cost Allocations and Recoveries*

- Cost Recovery NDSL
- NDSL Cancellation Income
- EOG (Educational Opportunity Grant)
- CWSP (College Work-Study Program)

Reports on the revenues of auxiliary enterprises will include all monies earned during the reporting period. Interdepartmental transactions of service departments and storerooms which provide services to the institution, as contrasted with services to students, faculty, and other staff, should not be included in this category. Normally such transactions do not result in receipts to the institution because they are essentially interdepartmental transfers of costs.

**BALANCE SHEET CATEGORY**

*Assets*

Economic resources that are owned by the institution. May have a definite physical character such as buildings or equipment or may exist in the form of valuable legal claims or rights.

*Liabilities*

Obligations owed by the institution.

*Fund Balance*

The difference between assets and liabilities. For some accounts, this entry may constitute the balance of a specific fund.

**BEGINNING YEAR BALANCE**

The balance for each fund group at the beginning of the reporting period.

**BUILDINGS**

A kind of capital investment expenditure. Measures that reflect all costs associated with the acquisition or purchase of buildings in which the institution conducts its programs.

**CAPITAL COSTS**

Capital costs represent the valuation placed upon the services provided by land, buildings, and equipment owned and utilized by an institution during a given time period.

**CAPITAL INVESTMENT EXPENDITURES**

One-time expenditures for physical resources that will benefit a program for more than one operating period.

## **CASH**

Negotiable currency on hand, petty cash, and cash in banks.

- Current Funds—Restricted and Unrestricted
- Loan Funds
- Plant Funds
- Endowment and Similar Funds

## **COST ACCOUNTING**

Items are reported as revenues and expenditures only when cash is received or made available to an institution and when it is disbursed.

## **COST CENTERS**

An aggregation of homogeneous activities whose outcomes contribute to the achievement of similar institutional objectives. Cost centers whose outcomes contribute directly to the accomplishment of the primary missions of the institution are termed primary cost centers.

### *Primary Cost Centers*

- Instruction
- Organized Research
- Public Service

Those cost centers whose outcomes are necessary or vital for the successful operation of other cost centers, but do not contribute directly to the accomplishment of the primary missions of the institution are termed support cost centers.

### *Support Cost Centers*

- Academic Support
- Student Service
- Institutional Support

## **COST TYPES FOR ANALYSIS**

### *Direct Cost*

Any cost that is identified specifically with a final cost objective (e.g., lower division agriculture instruction).

### *Full Cost*

The sum of all direct costs and those support costs allocated to a particular activity. One of the most important full-cost items is "full cost of instruction." This differs from direct costs in that it includes all costs of academic support, student support, and institutional support allowable to the instruction program. A direct cost has no allocated costs associated with it.

#### ***Support Cost***

Any costs that are initially assigned to a support cost center either as a result of the account crossover or as a result of a direct cost study. Examples of support costs are utilities, audio/visual services, operations and maintenance, etc.

#### ***Direct Cost to Student***

Those expenses incurred by a student in attending an institution, including such items as tuition, room and board, books.

#### **CURRENT FUNDS EXPENDED**

Includes all current funds expended, determined in accordance with the generally accepted accrual method of accounting, except for the omission of depreciation. (Depreciation, if charged, will be shown separately).

#### **CURRENT FUNDS EXPENDITURES**

This category is broken down between expenditures for educational and general and auxiliary enterprises. Student aid expenditures should be included as part of educational and general. The category should include all expenditures of the current fund during the reporting period. Expenditures from the current fund for debt service and for renewal and replacement should be distributed between auxiliary enterprises and educational and general.

#### **DEDUCTIONS**

Includes all deductions made from institutional assets during the reporting period. It does not include decreases in the balances of funds which result from transfers between funds. Such decreases are reflected in one of the "transfer" categories.

#### **DEPARTMENTAL RESEARCH**

Research which is performed as a part of the regular instructional services and which is budgeted and supported in the combined item of instruction and departmental research rather than separately as research. The term excludes sponsored research and other separately budgeted research. This is an expense of instruction and is considered essential to the conduct of an effective instructional program.

#### **DEPOSIT**

Deposit held for others which an institution may be required to repay in whole or in part.

- UNCF Campaign Contributions
- Students Special Deposits

- Bowling Fees
- Breakage Fees
- Key Deposits
- Student Organization
- Guard Uniforms
- Courtesy Committee

#### **DEPOSIT ON PURCHASES**

Includes airline travel deposits, postage meter deposit, deferred charges, etc.

#### **DUE FROM OTHER FUNDS**

##### *Asset*

The amount of current funds loaned temporarily to other fund groups.

- Current Funds Restricted—Asset
- Endowment and Similar Funds—Asset
  - A college or university, or group of institutions, may be the beneficiaries of trust held and administered by an outside fiscal agent.

##### *Liability*

Amounts that have been borrowed temporarily from other fund groups and will be repaid.

- Current Funds Restricted—Liability

#### **END-OF-YEAR BALANCE**

This figure is derived by obtaining the “net” result of (1) beginning year balance and (2) net change in fund balance for each fund group.

#### **ENDOWMENT FUNDS**

Endowment funds are those which a donor or other agency has stipulated that the principle is to be maintained inviolate and in perpetuity, and that only the income from the investment of the funds may be expended.

- Special Funds Interest
- Endowment Income General

#### **ENDOWMENT INCOME**

This total will include income from investments of restricted and unrestricted endowment, term endowment, quasi-endowment funds, Federal and State land-grant funds (land-grant institutions), and income held in irrevocable trusts by others.

#### **EQUIPMENT**

Movable property (that which is not permanently attached to a structure that has a useful life of more than one year and a cost above an institutionally defined minimum.)

## **EXPENDITURES**

The disbursement of revenue for services rendered whether in the form of construction, maintenance, utilities or anything that costs and requires disbursement of funds for compensation. Costs affiliated with:

- Deans' Offices
- Administrative Functions
- Alumni Office
- Academic/Course-Related Operations
- Library
- Institution Sponsored Training Projects
- Student Counseling Service
- Communications, Local Telephone Service
- Consultant Fees
- Delivery and Handling
- FICA Employer Share
- Group Insurance
- Laundry Services

## **EXPENDITURE CONTROL**

Control of those items of both unrestricted and restricted current funds.

## **EXPENDITURES FOR PLANT ASSETS**

Include all expenditures for land, buildings, improvements (other than buildings), and equipment, including library books.

## **FRINGE BENEFITS**

Employment benefits granted by the employing institution which involve monetary expenditures paid by the institution without affecting the basic wage rates. For financial records and cost analyses, include all costs to the institution, not limited to those regarded as part of the compensation rate. (See also: Section II., "Fringe Benefits," p. 11)

### *Group Life Insurance*

Employee group life insurance for which expenditures are made by the institution.

### *Guaranteed Disability Income Protection Plan*

Expenditures through insurance or otherwise for long-term disability income payments paid by the institution.

### *Hospitalization, Surgical, and Medical Plans (Basic and Major)*

Expenditures for hospitalization plans providing for hospital room and services; surgical plans providing for a licensed surgeon; and basic and major medical plans providing for medical expenses.

*Housing Plan*

Housing benefits which are granted by the institution, such as:

- Cash payments made to faculty for off-campus housing
- Institution-owned housing granted to faculty members or the purchase of houses financed by institution funds

*In Kind with Cash Option*

Personal benefits in kind with cash options, such as convention travel, faculty clubs, etc.

*Retirement Plan*

Contributions made by the institution or State toward employee's retirement.

*Sabbatical Plan*

A plan where by a leave of absence is granted covering one or more school terms for purposes of professional improvement, with some salary for such leave.

*Tuition Plan*

Cash grants or the cash value of tuition for an employee or his dependents.

*Unemployment Compensation*

Unemployment compensation taxes paid by the institution for employees.

**FUNCTIONAL CLASSIFICATION—CURRENT FUNDS EXPENDITURES**

- Instruction and Departmental Research
- Organized Activities Related to Educational Departments
- Sponsored Research
- Other Separately Budgeted Research
- Other Sponsored Programs
- Extension and Public Service
- Libraries
- Student Services
- Operation and Maintenance of Plant
- General Administration
- Staff Benefits
- General Institutional Expenses
- Student Aid
- Auxiliary Enterprises.

Institutions will have more detailed categories with the above groupings.

**FUND BALANCE ACCOUNTS**

Unexpended balance of funds restricted by donors or other outside agencies to specific operating purposes. (See also: Section V., "Liability," p. 92 and Section V., "Assets," p. 80.

*Annuity and Life Income Funds*

Liabilities consist of indebtedness against the fund assets. The fund balances should be shown in the equity section of the balance sheet.

*Current Funds Restricted*

Funds or income restricted by outside agencies or persons as to their use.

*Endowment and Similar Funds*

Liabilities consist of any form of indebtedness against the assets, such as mortgages payable on real estate investments.

– Balances of Endowment Funds

One which the donor or other agency has stipulated that the principal is to be maintained inviolate and perpetuity, and that only the income from the investments of the fund may be expended

– Balances of Quasi-Endowment Funds

One which the governing board of an institution has determined to be retained and invested

– Balances of Term Endowment Funds

One which a donor or other outside agency has provided to be released from inviolability to permit all or part of it to be expended upon the happening of a particular event or the passage of a stated period of time.

*Plant Funds for Renewals and Replacements*

Consist of payables; evidences of bonds, notes, or mortgages payable.

*Plant Funds - Unexpended*

Consist of payables, evidences of bonds, notes, or mortgages payable; and temporary advances from other funds for plant purposes.

**FUND BALANCE ALLOCATED**

Funds allocated for unrestricted and restricted use, and unrestricted gifts.

**FUND BALANCE—GIFTS**

Net unexpended balance of funds received as unrestricted gifts and bequests whose use has been or will be designated by the governing board.

**FUND BALANCE UNALLOCATED**

Funds not allotted for restricted or unrestricted use.

**FUND GROUPS**

*Current Funds*

Funds expendable for current operating purposes, either unrestricted or restricted.

***Loan Funds***

Funds available to be loaned to students, faculty, or staff.

***Endowment and Similar Funds***

Those funds whose principal is nonexpendable as of the date of reporting and invested, or is available for investment for the purpose of producing income. Included are endowment funds, term endowment funds, and quasi-endowment funds.

***Annuity and Life Income Funds***

Those funds acquired by an institution subject to annuity contracts, living trust agreements, or gifts and bequests reserving life income to one or more beneficiaries.

***Plant Funds***

Funds to be used for the construction, rehabilitation, and acquisition of physical properties for institutional purposes; funds already expended for plant properties; funds set aside for the renewal and replacement thereof; and funds accumulated for the retirement of indebtedness thereon.

***Agency Funds***

Funds received and held by an institution as custodian or fiscal agent for others; funds of student organizations, individual students, or faculty members.

**FUND RESTRICTIONS**

***Unrestricted Funds***

Monies available for any program purpose. This category includes monies which are restricted only by object of expenditure (e.g. salaries) or for use within a particular school or department of the institution.

***Designated Funds***

Monies which have been designated by the governing board of the institution or by some body internal to the institution to be used for a particular program purpose. The designation for the use of these monies can be removed or changed by the governing board or the internal agency and, therefore, are not legally binding upon the institution. This category would include all monies which are not unrestricted by HEFM definition and which do not have restrictions which were placed on them as a prior condition for receipt by the institution. (This category is not yet widely used; it is proposed in the drafts of the NCHEMS *Higher Education Finance Manuals*).

***Restricted Funds***

Monies which are restricted to a specific program use by the donor, and which would, therefore, be considered legally binding. This category includes



monies which were restricted to a particular program as a condition to which the institution had to agree in order to receive the monies.

### **GOVERNMENT APPROPRIATIONS**

Includes all governmental appropriations. Appropriations are those funds which are allocated for the general support of the educational programs. They differ from government grants and contracts which are usually disbursed for a particular purpose. This category includes funds disbursed for the account of an institution by a governmental agency, such as payments into a State retirement system on behalf of the institution. Those tuition and fees collected by the institution and returned to the institution in the form of State appropriations would have to be subtracted from this total, as they have already appeared as "tuition and fees."

Government appropriations are broken down by level of government--Federal, State and local. The criterion used in determining which level to consider as "funder" is that the funder is that agency (or level) which makes the decision that the monies will be allocated for a particular purpose in higher education. Therefore, by this definition, a Federal grant for research which flows "through" the State to the institution would be classified as Federal funds. However, Federal monies distributed to the State in the form of revenue-sharing funds and which are then disbursed to the institution should be considered as State funds rather than Federal funds.

### **GOVERNMENT GRANTS AND CONTRACTS**

Includes all funds earned as a result of a government grant or contract. In most cases the actual grant or contract money itself is restricted. However, most indirect cost reimbursements are unrestricted and would, therefore, be included in the unrestricted current funds category. This category would also include administrative allowances charged to government grant (e.g. Educational Opportunity Grants). This source is also disaggregated by level of government. The criteria used in determining the appropriate level of government is the same as that described above in "Government Appropriations."

### **GRANTOR AGENCIES**

Public agencies, such as the National Science Foundation, that grant funds for the conduct of institutional programs.

### **INCOME**

All negotiable currency collected from the rendering of service, the operation of auxiliary enterprises, special projects, tuition and fees, governmental appropriations--State and Federal endowments, gifts, sponsored research--governmental and nongovernmental, sponsored programs--governmental and nongovernmental.

### **INCOME, DEFERRED**

Payments made to the institution in advance for services to be rendered in a subsequent period.

- Activity
- Board Charges
- Breakage
- Cultural
- Health and Recreation
- Miscellaneous Fees
- Nursery School
- Operative Surplus
- Registration Fees
- Reserved Room Fees
- Room Charges
- Summer Board
- Tuition
- UNCF

### **INDIRECT COSTS**

Those costs not directly attributable to the achievement of any of the programs of the institution, which in cost analysis must be allocated to the various programs by formula or other convention to achieve the total allocation of all costs to all programs. In government (or private) contracts or grants, that allowance for administrative and other fixed and overhead costs, which upon receipt are normally returned to the general fund of institution.

### **INSTITUTIONAL BENEFACTOR**

Private persons or agencies which provide funds to the institution to support its various programs.

### **INSURANCE**

Prepaid insurance premiums.

### **INTERFUND ACCOUNT**

- Due to or from other funds
- Due to or from CWSP (College Work-Study Program)

### **INTERSCHOOL ACCOUNT**

Due to or from another institution.

## **INVENTORIES**

Merchandise for sale and supplies and stocks in stores. Include goods not yet charged as expense but carried in stock in general storerooms for future requisition for sale. Maintenance includes:

- Building materials on hand
- Janitorial supplies on hand
- Office supplies on hand

## **INVESTMENT INCOME**

This category is disaggregated into (1) Endowment Income and (2) Other Investment Income. Endowment income includes all current yield on the investment of endowment funds as well as all distributions from funds held in trust by others under irrevocable trusts. Other investment income includes the return on any other investments that are considered current revenue. For those institutions employing the "total return" concept of endowment fund management, that portion of the capital gains of the endowment fund appropriated for use by the institution should be reported in the "transfers" category as a transfer to the current fund from the endowment fund rather than being considered as an addition to a fund group.

## **INVESTMENTS**

Includes securities purchased out of current funds or received as assets of current funds. Gifts should be valued at cost of appraisal value.

- Current Funds Restricted
- Endowment and Similar Funds—includes securities, real estate, and any investment in institutional plant
- Annuity and Life Income Funds—includes bonds, preferred stocks, common stocks, mortgage notes, and real estate

## **LAND AND IMPROVEMENTS**

A kind of capital investment expenditure; a measure that reflects all costs associated with the acquisition and subsequent improvements of land, except buildings, by the institution.

## **LIABILITY**

All accounts payable and accrued expenses represent liabilities for goods received and other expenses incurred for which disbursement has not been made. (See also: Section V., "Fund Balance Accounts," p. 87)

## **LOAN CANCELLATION AND WRITE-OFFS**

Includes all deductions resulting from the cancellation of uncollectible loans and write-offs on any uncollectible receivables.

## **LOAN FUND(S)**

Includes:

- Liabilities—money borrowed by the institution which must be repaid.
- Assets—money or equivalent lent by the institution from which revenues are received.

## **NET CHANGE IN FUND BALANCE**

This figure is derived by obtaining the “net” result of (1) total additions, (2) total deductions, (3) total mandatory transfers, and (4) total nonmandatory transfers for each fund group.

## **NET REALIZED LOSSES ON INVESTMENTS**

Includes all losses (net) on the sale of investments (e.g., stocks and bonds). It would not include proceeds on the sale of capital assets which were converted to cash during the reporting period.

## **NOTES PAYABLE**

Liabilities for outstanding notes covering borrowings for current operations.

## **NOTES RECEIVABLE**

Includes notes shown at face value less an allowance for doubtful loans.

- Loan Funds

## **OBJECT CLASSIFICATION—EXPENDITURES**

### *Faculty Salaries*

Compensation including fringe benefits to those individuals that the institution considers its faculty (part-time and full-time faculty as well as graduate assistants).

### *Nonfaculty Salaries*

Compensation including fringe benefits paid to all employees of the institution except those considered faculty.

### *Supplies and Services*

All current operating expenditures other than compensation for personal services (including fringe benefits), expenditures for capital equipment, and stipends.

### *Capital Equipment*

Those items of property that have an acquisition cost greater than a fixed institutional standard (often \$200) and an expected service life that exceeds one year.

**Stipends**

Financial assistance awarded to students (both undergraduate and graduate). Includes scholarships, fellowships, and traineeships. Recipients of stipends are not required to render service to the institution as a consideration of their awards, nor are they required to repay them.

**ORGANIZATION UNIT**

The smallest identifiable functioning entity of the institution that has a budget for operations, administrative responsibility for an account, and a staff assigned to it. In the academic area this will often be a department; in research or public service it may be a project; and in administration it may be an office or a section. (See also: Section I., "Organizational Unit," p. 4)

**ORGANIZED ACTIVITIES RELATED TO EDUCATIONAL DEPARTMENTS REVENUE**

Includes all funds derived from operations carried on primarily for the training of students. If service to students, rather than instruction, is the primary purpose of the operation, the revenues should be reported as "auxiliary enterprise" receipts.

**OTHER EXPENDITURES**

Includes all deductions from any fund group (with the exception of agency funds) which are made during the reporting period and which are not included in one of the specific deduction categories.

**OTHER SOURCES**

Includes all funds earned during the reporting period which are not reported in any of the described categories.

**PAYMENTS ON ANNUITY AND LIFE INCOME**

Includes all payments pursuant to agreements whereby assets are made available to the institution on the condition that the institution: (1) bind itself to pay stipulated amounts periodically to designated individuals, or (2) periodically pay the income earned on the assets to designated individuals. The first type of agreement results in what is referred to as "annuity funds," while the second agreement is called "life income funds." Payments to satisfy either type of agreement are reported in this deduction category.

**PETTY CASH**

Cash kept on hand for payment of minor items.

#### **PLANT FUNDS FOR INVESTMENT IN PLANT**

Include the amount disbursed from unexpended plant funds; amount expended from current funds for equipment.

#### **PLANT FUNDS FOR RENEWALS AND REPLACEMENTS**

Consists of cash, investments, receivables, and funds on deposit to be used for reconditioning of physical plant or structure replacement.

#### **PLANT FUNDS FOR RETIREMENT OF INDEBTEDNESS**

Plant Funds for Retirement of Indebtedness consists of cash, investments and reserves for amortization or liquidation of institutional loans, mortgages or other monies owed banks, government agencies or individuals.

#### **PLANT FUNDS—UNEXPENDED**

Funds to be used for the acquisition of physical properties for institutional purposes but not dispersed.

#### **PREPAID EXPENSES AND DEFERRED CHARGES**

That portion of operating expenditures that is properly chargeable to a period subsequent to the date of the Balance Sheet.

#### **PRIVATE GIFTS AND GRANTS**

All revenues, receipts and funds given to the institution by any private, nongovernmental source. Includes:

- All income distributed from revocable trusts or distributed by direction of the trustees of such trusts.
- Estimated value of services contributed by members of religious orders. (A corresponding amount should be included in analyses of expenditures) Value of services provided by persons paid from noninstitutional sources.
- Indirect cost reimbursements and administrative allowances associated with private gifts and grants. Does not include:
  - Distributed income from irrevocable trusts.
  - Funds received for specified research or other sponsored programs in accordance with grants, contracts, or other written agreements.

#### **PROVISION FOR ENDOWMENT INCOME STABILIZATION**

Any form of indebtedness against the assets, such as mortgages payable on real estate investments.

### **QUASI-ENDOWMENT FUNDS**

Funds which the governing board of an institution, rather than the donor or other outside agency, has determined are to be retained or invested. The term "Funds Functioning as Endowment" may also be used to describe such designated funds. The governing board has the right to decide at any time to expend the principal of such funds.

### **RESEARCH, SEPARATELY BUDGETED**

Activities performed in separately organized research division that are not financed in the manner described as "Research, Sponsored."

### **RESEARCH, SPONSORED**

Research activities performed in accordance with the conditions of agreements with governmental agencies or other outside organizations or persons to conduct research of specified scope. Such agreements may be made on a cost or fixed-price basis, or on the basis of gifts or grants accepted by the institution subject to certain terms or conditions.

### **RESERVE FOR ENCUMBRANCES**

The practice of an institution to record commitments in the form of purchase orders as current expenditures.

### **RESTRICTED GIFTS**

Funds or income restricted by outside agencies or persons as to use, earmarked for a specific purpose or use. Foundation gifts generally restricted:

- Mellon Foundation Support
  - Ford—Admissions
  - UNCF—Support
  - Woodrow Wilson Intern
- (See also: Section V., "Fund Restrictions," p. 89)

### **REVENUE ACCOUNTS, CURRENT FUNDS**

- Student Tuition and Fees
- Governmental Appropriations
- Endowment Income
- Sponsored Research
- Student Aid
- Auxiliary Enterprises
- Service Department

### **REVENUE CONTROL**

All receipts and accruals of unrestricted current funds and of restricted funds expended during fiscal period.

### **REVENUE, DEFERRED**

Payment made to the institution in advance for services to be rendered in a subsequent period.

### **REVENUE, CURRENT FUND**

Includes only those revenues of the current fund that are expended during the reporting period. Therefore, it would not include those unrestricted or designated current fund revenues that were transferred out of the current fund or designated (or redesignated) for some particular purpose and not expended (e.g., designated as reserve funds).

### **SALES OF EDUCATIONAL DEPARTMENTS**

Includes all funds earned from the operation of educational departments but which are not directly associated with the training of students. Examples of such monies are fees derived from film rentals, scientific and literary publications, and testing services. If service to the public is the primary purpose of an operation rather than the training of students (for example, in the case of hospitals operated by universities) the receipts generated by the operation would be included in this category.

### **SERVICE DEPARTMENT**

An entity that provides to the various divisions of a institution services that might be purchased from commercial sources but for reasons of convenience, cost or control, are more effectively provided through the institution.

### **SOURCE OF FUNDS**

The following categories are those recommended in *College and University Business Administration* (ACE 1968) and are currently being used in HEGIS.

- Educational General
  - Student Tuition and Fees
  - Governmental Appropriations
    - Federal
    - State
    - Local
  - Endowment Income
  - Gifts (or Gifts Applied)



- Sponsored Research
  - Governmental
  - Nongovernmental
- Other Separately Budgeted Research
- Other Sponsored Programs
  - Governmental
  - Nongovernmental
- Recovery of Indirect Costs—Sponsored Programs
- Sales and Services of Educational Departments
- Organized Activities Related to Educational Departments
- Other Sources
- Student Aid
- Auxiliary Enterprises

Another alternative currently being explored for possible use in various products is:

- Student Tuition and Fees
- External Sources
  - Government
    - Local
    - State
    - Federal
  - Private
  - Gifts
    - Foundations
    - Corporations
    - Individuals
  - Other
    - Foundations
    - Corporations
    - Individuals
- Return on Endowment
  - Current Yield
  - Utilized Gain
- Other Sources
  - Sales and Services of Educational Departments
  - Organized Activities Related to Educational Departments
  - Auxiliary Enterprises
  - Return on Current Fund Investments
  - Transfer from other fund groups
  - Other Sources

## STUDENT AID

Programs such as scholarships, fellowships, grants-in-aid, loans, part-time employment, and special arrangements for the payment of tuition and other charges. (See also: Section III., "Student Aid," p. 40)

### **STUDENT FEES**

Monies which students pay for laboratory, health services, athletics and other scholastically-related purposes.

### **SUPPLIES AND SERVICES**

A kind of operating expenditure that encompasses the management of supplies and service resources in financial terms.

### **TARGET GROUP**

A target group defines those persons for whom the benefits of a particular activity are intended. The specification of a particular cost by target group involves aggregating or analyzing the data in such a way as to identify the costs associated with a particular target group for that activity.

### **TERM ENDOWMENT FUNDS**

Funds which donors or other outside agencies, by terms of the instrument of gift, have provided are to be released from inviolability to permit all or parts of them to be expended upon the happening of a particular event or the passage of a stated time period.

### **TOTAL EXPENDITURES**

Includes the sum of all expenditures of the current fund during the reporting period. It includes educational and general, auxiliary enterprises, and student aid expenditures of the current fund.

### **TRANSFERS**

A specific change in the purpose of funds, and the moving of their assets, liabilities, and balances from one fund group to another. Examples are the movement of unallocated current funds to plant funds, unallocated current funds transferred to loan funds, etc. HEGIS requests information on current funds transferred to expenditure for physical plant assets.

### **TUITION AND FEES**

Includes all tuition and fees assessed (net of refunds) against students for educational and general and auxiliary purposes. Revenues from fees on which there are binding restrictions because they have been specifically assessed for debt service on institutional plant or for renewals and replacements of plant expansion facilities, should be reported as direct additions to plant funds rather than as part of current funds, since such fees are not considered to be available for current operating purposes. If the assignment of fees to debt

service, etc. is an administrative action only, or subject to change by the governing board, then such fees should be reported as unrestricted current fund receipts. Those tuition and fees which the State collects and returns to the institution in the form of State appropriations should also be included in this category. If all tuition and/or fees are remitted to the State as an offset to the State appropriation, the total for tuition and fees should be deducted from the total for State appropriations and displayed in this category. For analytic purposes (e.g., cost analyses) tuition and fee remissions or exemptions should be assessed and tabulated as student fee revenues although it is not intended to effect collection from the students. (A corresponding amount, as well as the amount of other student aid granted out of current funds. (See also: Section I., "Tuition and Fees," p. 43)

## **VI. Technical Terms Not Elsewhere Defined**

### **ACADEMIC ADMINISTRATION**

Institutional activities that provide administrative services to instruction, research, and public service programs at the college and department level.

### **ACADEMIC SUPPORT PROGRAM**

A program which directly supports the academic functions of the institution (e.g., libraries, computer services, and audio/visual services).

### **ANCILLARY SUPPORT**

Activities which provide support services to instruction, research, and public service and are not appropriately classified within the various academic support program.

### **BENEFICIARY GROUP MEASURES**

Program measures that identify and quantitatively describe the people or groups of people who benefit directly or indirectly from either the activities or outcomes of a program during a stated time period.

### **BOARD POLICIES**

The policies of an institution which specify those groups of students who are required to sign contracts which obligate them to take their meals in an institution-owned dining facility. These policies also normally state the particular dining facilities which will be used to accommodate particular groups of students (e.g., residents of specific residence halls, etc.)

### **CAPITAL DEVELOPMENT PROGRAM**

The specification of priorities for projects identified within the facilities development program and the creation of a preliminary plan for facilities construction projects, usually over an extended period of time.

### **CLERICAL RANK**

The categorization of clerical positions as a function of a number of variables such as responsibility, skill level, and length of course.

### **CLERICAL STAFFING POLICY**

The institutional policy stating the level of secretarial and clerical support to be provided to faculty or other personnel. In its most common form a clerical staffing policy states a ratio of full-time equivalent faculty to full-time equivalent clerical employee(s).

### **COMMON-INTEREST GROUP**

A target clientele group having professional, employment, or similar interests in common, such as continuing medical education, C.P.A. review, etc.

### **COMPREHENSIVE PLAN**

A statement of institutional goals and objectives of the expected nature and timing of institutional development and of estimated manpower, fiscal, and facilities resources required to attain the stated institutional goals and objectives over a specified period of time (e.g., 5, 10, or 20 years).

### **COST FINDING PRINCIPLES (CFP)**

An NCHEMS project dealing with the development of alternative procedures for direct and full costing of programs as defined by the NCHEMS Program Classification Structure.

### **DATA ELEMENT DICTIONARY (DED)**

A project or document dealing with the forecast and definition of a set of data elements needed for operational, management, reporting, and exchange purposes. (NCHEMS is developing a series of individual DED's; American Association of Collegiate Registrars and Admissions Office (AACRAO) has handbooks that serve a similar purpose; National Association of College and University Business Offices (NACUBO) and OE also have manuals and/or taxonomies; Management Information Systems/Technical Assistance Consortium to Improve College Services (MIS/TACTICS) has an Educational DED expanding on all of these).

### **DESCRIPTOR**

A specific quantitative or descriptive indicator.

### **FACILITIES DEVELOPMENT PROGRAM**

The outcomes of the process which converts projected space requirements into identifiable building units. A listing of the additional buildings required to house the institution's proposed programs with associated information concerning the departments scheduled to occupy the buildings and general information about the types of space to be contained within.

## **FACILITIES INVENTORY**

A tabulation of all physical facilities of the institution. When done in accordance with Federal guidelines, the facilities are classified by type of space, organizational unit, discipline division or specialty, and function.

## **FACILITIES INVENTORY AND CLASSIFICATION (FIC)**

The development of appropriate resource and asset measures for facilities and the development of procedures for lodging facilities resource measures. A project was developed under contract with OE for use in HEGIS and statewide inventories.

## **FACILITIES PLANNING**

The process by which the amount of facilities resources required by an institution's programs are estimated. In general, the outputs of facilities planning procedures which are required for development of a comprehensive plan are the projected amounts of each type of space needed to house the activities of each department or organizational unit within an institution.

## **FACULTY ACTIVITY ANALYSIS (FAA)**

The development of categorizations and definitions of faculty activities; procedures for lodging faculty measures; and instruments for collecting data on faculty assignments, activities, and workload. Also concerned with suggestions for planning and management analyses which can be performed on the collected data.

## **FINANCIAL MEASURES**

Measures that quantitatively express in dollar amounts the source of funds and expenditures for physical and human resources utilized at a specified level of activity during a stated period of time.

## **GENERAL PLANNING CRITERIA**

Space or estimation guides which are designed for use in calculating aggregate space needs.

## **HIGHER EDUCATION FINANCE MANUAL (HEFM)**

A contract project dealing with the definition and categorization of financial resources and asset measures necessary for planning, budgeting, and reporting,

and the development of procedures for using the measures. Under development under contract with OE for use in HEGIS.

#### **HIGHER EDUCATION GENERAL INFORMATION SURVEY (HEGIS)**

The annual survey of colleges and universities eligible for listing in the *Education Directory—Higher Education*, conducted by the National Center for Educational Statistics (NCES) of the U.S. Office of Education (OE).

#### **INDUCED COURSE-LOAD MATRIX (ICLM)**

An array which describes the distribution of the average load placed on the various academic departments (disciplines) by students of various student levels and majors.

#### **INFORMATION EXCHANGE PROCEDURES (IEP)**

A project involved with the development of standard procedures for exchange and reporting of standard institutional information; descriptions of selected analyses which can appropriately be performed on these data; and additional structures for organizing information.

#### **INDEPENDENT OPERATIONS PROGRAM**

Programs which are independent of, or unrelated to, the basic missions of the institution. These may include noninstitutional agencies housed by the institution or operations generating income for the institution that are not otherwise related to the purposes of the institution.

#### **INSTITUTIONAL SUPPORT PROGRAM**

Programs within the institution which provide campuswide support to the other programs.

#### **INSTRUCTION PROGRAM**

All formal instructional activities in which a student engages to earn credit toward a degree or certificate.

#### **INTERCOLLEGIATE ATHLETICS**

Formally organized athletic activities which involve competition of teams or individuals representing two or more colleges or universities. Intercollegiate athletics (the actual event as well as practice), is one of the four categories of activities commonly conducted in athletic/physical education facilities.

### **INTRAMURAL ATHLETICS**

Formally organized athletic activities which involve competition of teams and/or individuals who are students of the same institution. Intramural athletics is one of the four categories of activities commonly conducted in athletic/physical education facilities.

### **INTRAINSTITUTIONAL PLANNING AND MANAGEMENT (IIMP)**

A project involved with the identification of the basic information appropriate for planning and management at avarious levels within the institution; the suggestion of methods of interrelating various decisions and types of information over time; and the suggestion of appropriate analysis and applications of the above information.

### **LENGTH OF SERVING PERIOD**

The length of time a dining facility is scheduled for use in serving a meal.

### **MANPOWER ACCOUNTING MANUAL (MAM)**

The definition and categorization of personnel resource measures and the development of procedures for lodging these measures.

### **MANPOWER ACCOUNTING STRUCTURE**

A two-dimensional matrix for classifying employee assignment by occupational activity and institutional program function.

### **MANPOWER ASSIGNMENT CLASSIFICATION**

Principles and procedures for classifying employee activities on the basis of FTE assignment to institutional programs.

### **OCCUPATIONAL ACTIVITY CATEGORY**

A category of the manpower accounting structure which identifies assignment with one of seven broad occupational groups.

### **OFFICE LANDSCAPING**

A design technique for office space which is intended to provide flexible office spaces by omitting partitioning. Visual privacy is obtained through the



strategic arrangement of furniture such as bookcases, room dividers, and planters.

### **OUTCOMES PROJECT**

The development of structures, measures, procedures, and analyses appropriate for including the outcome and impacts of postsecondary education in the postsecondary education planning and management process at the institutional, State, and Federal levels.

### **PERSONNEL**

The personnel of an institution includes the body of persons employed.

- The staff of an institution
- The office that manages personnel activities
- A type of operating expenditure in the financial records

### **PHYSICAL EDUCATION CLASSES**

Formally organized, scheduled, physical education instruction activities. Physical education classes represent one of the four categories of activities commonly conducted in athletic/physical education facilities.

### **PRIMARY PROGRAMS**

Primary programs contain the activities directly related to the accomplishment of the missions of higher education.

### **PROGRAM**

A set of activities which, operating collectively, achieve a well-defined objective or set of objectives of the organization, often within a specified time frame. These activities may be described in terms of the resources, technologies, and policies which, through their integrated operation, produce goods or services which are of value to the organization because they contribute to the achievement of the objective or set of objectives.

### **PROGRAM ANALYSIS**

The investigation of the historical relationships between selected variables or phenomena (e.g., the relationship between weekly student hours and weekly faculty contact hours). The investigation of those relationships which are particularly relevant to the program planning process.

### **PROGRAM BUDGETING**

A resource allocation technique which facilitates the organization and identification of the activities of an institution in terms of its objectives, displays

the cost of these activities over an extended time frame, and relates these activities and their costs to the outputs of the institution's programs.

#### **PROGRAM CATEGORY**

An aggregation of program elements which may be used to sum related program elements across program lines. For the purposes of the *Facilities Inventory Classification Manual*, a classification of similar or related activities by discipline area or major function.

#### **PROGRAM CLASSIFICATION STRUCTURE (PCS)**

A system which categorized the activities of an organization in a program-oriented framework that relates these activities to organizational objectives.

#### **PROGRAM DATA**

Data regarding such things as courses, students, and instructional loads which must be available before planning procedures can be implemented.

#### **PROGRAM DEFINITION**

The development of a proposed set of courses of action (the means) by which the desired ends (objectives) can be achieved. As related to the comprehensive planning process, program definition involves the development of a comprehensive set of planning assumptions and guidelines upon which the projections are based.

#### **PROGRAM ELEMENT**

A discrete management unit that may be thought of as a collection of resources, technologies, and policies that through integrated operation produce goods or services (i.e., an output) of value to the organization because they contribute to the achievement of an institutional objective.

#### **PROGRAM MEASURES**

Quantitative indicators of the resources utilized, the activity levels generated, the groups served and benefitted, the expenditures incurred, the revenues generated, and the outcomes achieved by programs and program elements. These program measures fall into six major groups, as follows.

#### *Resource Measures*

Measures of the physical and human resources utilized during a stated time period. Resource measures are expressed only in nonmonetary terms, i.e., physical units. Subgroups of resource measures are:

- Personnel
- Facilities
- Equipment
- Supplies and Services

#### *Financial Measures*

Measures that reflect the expenditures of dollars for physical and human resources utilized at a specified level of activity during a stated time period. Financial measures also indicate the source of funds expended. Subgroups of financial measures are:

- Revenues
- Expenditures

#### *Target and Beneficiary Group Measures*

Measures that identify and describe the groups to be served by, and the groups that benefit from program activities during a stated time period. The measures can be expressed in absolute numbers, percentages, or descriptive terminology. Such measures are, for example, specific categories of students, faculty, or segments of the community.

#### *Activity Measures*

Measures reflecting the level and type of operations carried on during a stated time period. For example, an activity measure in an instructional program is the number of weekly student contact hours generated; for a student services program an activity measure is the number of meals served; an activity measure for a personnel service program is the number of job applications processed or the number of new employees hired; and an activity measure for a custodial service program is the number of square feet maintained.

#### *Outcome Measures*

Measures that quantitatively express the outcomes achieved or the products generated by the activities of a program during a stated period of time. Examples of outcome measures for an instructional program are the numbers of degrees or certificates granted and the number of program completions. An organized research program may have such outcome measures as patents awarded, number and type of publications produced, and awards received.

### **PROGRAM PLANNING**

The process by which those data necessary to estimate the amounts of resources required to implement a course of action (a program) are derived. The application of the set of planning assumptions in order to calculate those factors which can be converted into terms of resource requirements. The

estimation of such things as instructional loads to be placed on each of the academic departments, the number of each type of staff required to carry out the programs, distributions of classroom section sizes, etc.

### **PROGRAM STRUCTURE**

A classification system which categorizes the activities of an organization according to their relationship to the organization's objectives.

### **PUBLIC SERVICE PROGRAM**

Programs within the institution which provide outputs directed toward the benefit of the community or individuals residing within the geographic service area of the institution.

### **RESEARCH FACULTY**

Faculty employees of the institution assigned to activities within the organized research program.

### **SCHEDULE OF COURSES**

A publication or compilation containing information about the courses to be offered during a given term including such information as place of meeting, days and hours of meeting, and course credit value.

### **SITE PLANNING**

The process by which the map of an institution's campus is revised to reflect the appearance of projected new buildings, other physical facilities and landscaping, and the disappearance of any buildings scheduled for demolition. The process of determining the locations for buildings and other facilities taking into consideration such things as functional relationships with other facilities, vehicular and pedestrian traffic flow, utilities requirements, and locations, aesthetics, etc.

### **SPACE MANAGEMENT**

The process by which existing facilities are allocated to current programs (or organizational units), usually through application of detailed planning and programming methodologies.

### **STAFF**

All the employees of an institution, including faculty.

**SUPPORT STAFF**

All employees in nonacademic departments and all employees in academic departments except instructional staff and research and public service professionals who have the equivalent of faculty appointments.

**VOLUME**

A physical unit of any printed, typewritten, handwritten, mimeographed, or processed work contained in one binding or portfolio, hardbound or paper bound, which has been classified, catalogued, and/or made ready for use, including bound periodical volumes.

## APPENDICES

## Appendix A

### Abbreviations

A.A.	Associate in Arts
ACT	American College Testing Examination
ADP	Automatic Data Processing
A.S.	Associate in Science
ASF	Assignable Square Feet
AvRUR	Average Room Utilization Rate
AvSOR	Average Station Occupancy Ratio
AvSS	Average Section Size
AvSUR	Average Station Utilization Rate
B.A.	Bachelor of Arts
B.D.	Bachelor of Divinity
B.S.	Bachelor of Science
CEEB	College Entrance Examination Board
CFP	Cost Finding Principles
CUPA	College and University Personnel Association
CWSP	College Work-Study Program
da	day
D.D.S.	Doctor of Dental Surgery
DED	Data Element Dictionary
D.M.D.	Doctor of Dental Medicine
D.S.C.	Doctor of Surgical Chiropody
D.V.M.	Doctor of Veterinary Medicine
EDED	Education Data Elements Dictionary
E.E.D.	Doctor of Electrical Engineering
e.g.	for example
EOG	Educational Opportunity Grant
FAA	Faculty Activity Analysis
FCH	Faculty Contact Hours
FICA	Federal Insurance Contributions Act (social security)
FICM	Facilities Inventory and Classification Manual
FICE	Federal Interagency Committee on Education
FTE	Full-Time Equivalent
GED	General Equivalence Diploma
GPA	Grade Point Average

GSF	Gross Square Feet
HEFM	Higher Education Finance Manual
HEGIS	Higher Educational General Information Survey
IAvSS	Imputed Average Section Size
I.D.#	Identification Number
IEP	Information Exchange Procedures
IIPM	Intra-Institutional Planning and Management
IRUR	Imputed Room Utilization Rate
ISOR	Imputed Station Occupancy Rate
ISUR	Imputed Station Utilization Rate
IWRH	Imputed Weekly Room Hours
IWRHC	Imputed Weekly Room Hour Capacity
IWSH	Imputed Weekly Student Hours
J.D.	Juris Doctor
L.L.B.	Bachelor of Law and Letters
M.A.	Master of Arts
MAM	Manpower Accounting Manual
M.D.	Doctor of Medicine
M.Ed.	Master of Education
MIS	Management Information Systems
M.S.	Master of Science
mo	month
N	Number
NCES	National Center for Educational Statistics
NCHEMS	National Center for Higher Education Management Systems
NDEA	National Defense Education Act
NDSL	National Direct Student Loan (previously referred to as National Defense Student Loan)
NEBHE	New England Board of Higher Education
NSF	National Science Foundation
O.D.	Doctor of Optometry, Doctor of Osteopathy
PCS	Program Classification Structure
Ph.D.	Doctor of Philosophy
Pod.D.	Doctor of Podiatry
R	Number of Rooms
ROTC	Reserve Officers Training Corps
RUR	Room Utilization Rate



SACC	Southern Association of Colleges and Schools
SAT	Scholastic Aptitude Test
SC	Station Count
SCH	Student Credit Hours
SOR	Station Occupancy Rate
SREB	Southern Regional Education Board
SS	Section Size
SUR	Station Utilization Rate
TACTICS	Technical Assistance Consor- tium to Improve College Services
TIAA	Teacher's Insurance Annuity of America
TOEFL	Testing of English as a Foreign Language
UNCF	United Negro College Fund
WCH	Weekly Contact Hours
WICHE	Western Interstate Commission for Higher Education
WRH	Weekly Room Hours
WRCHC	Weekly Room Hours Capacity
WSH	Weekly Student Hour
WSHC	Weekly Student Hour Capacity
yr	year

## Appendix B

### The HEGIS Taxonomy <sup>1</sup>

In view of the length and comprehensive nature of the *Taxonomy of Instructional Programs*, it may sometimes be difficult to locate the appropriate reporting title for a specific instructional program. To facilitate the location process, a summary list of the program categories (discipline categories) is shown below.

#### PROGRAM (DISCIPLINE) CATEGORIES

*(Conventional academic subdivisions of knowledge and training)*

##### *Code*

0000	GENERAL
0100	AGRICULTURE and NATURAL RESOURCES
0200	ARCHITECTURE and ENVIRONMENTAL DESIGN
0300	AREA STUDIES
0400	BIOLOGICAL SCIENCES
0500	BUSINESS and MANAGEMENT
0600	COMMUNICATIONS
0700	COMPUTER and INFORMATION SCIENCES -
0800	EDUCATION
0900	ENGINEERING
1000	FINE and APPLIED ARTS
1100	FOREIGN LANGUAGES
1200	HEALTH PROFESSIONS
1300	HOME ECONOMICS
1400	LAW
1500	LETTERS
1600	LIBRARY SCIENCE
1700	MATHEMATICS
1800	MILITARY SCIENCES
1900	PHYSICAL SCIENCES
2000	PSYCHOLOGY
2100	PUBLIC AFFAIRS and SERVICES
2200	SOCIAL SCIENCES
2300	THEOLOGY
4900	INTERDISCIPLINARY STUDIES

<sup>1</sup>Source: Robert A. Huff and Marjorie O. Chandler, *A Taxonomy of Instructional Programs in Higher Education* (Washington, D.C.: National Center for Educational Statistics, Office of Education, 1970).

*(Technological and occupational specialties related to curriculums leading to associate degrees and other awards below the baccalaureate)*

*Code*

5000 BUSINESS and COMMERCE TECHNOLOGIES  
5100 DATA PROCESSING TECHNOLOGIES  
5200 HEALTH SERVICES and PARAMEDICAL  
TECHNOLOGIES  
5300 MECHANICAL and ENGINEERING  
TECHNOLOGIES  
5400 NATURAL SCIENCE TECHNOLOGIES  
5500 PUBLIC SERVICE RELATED TECHNOLOGIES

An alphabetical listing of all program subcategories (discipline categories) follows. Note that a few modifications have been made to adapt this list to use for facilities inventory. This section is included for purposes of definition to indicate which specific program subcategories are included in each program category. Institutions may wish to code at this level of detail for their own internal management purposes.

**PROGRAM (DISCIPLINE) SUBCATEGORIES**

**0000 GENERAL**

**0100 AGRICULTURE AND NATURAL RESOURCES**

0101 Agriculture, General  
0102 Agronomy (Field Crops, and Crop  
Management)  
0103 Soils Science (Management and Conservation)  
0104 Animal Science (Husbandry)  
0105 Dairy Science (Husbandry)  
0106 Poultry Science  
0107 Fish, Game, and Wildlife Management  
0108 Horticulture (Fruit and Vegetable  
Production)  
0109 Ornamental Horticulture (Floriculture,  
Nursery Science)  
0110 Agricultural and Farm Management  
0111 Agricultural Economics  
0112 Agricultural Business  
0113 Food Science and Technology  
0114 Forestry  
0115 Natural Resources Management  
0116 Agriculture and Forestry Technologies  
0117 Range Management  
0199 Other, Specify

**0200 ARCHITECTURE AND ENVIRONMENTAL DESIGN**

- 0201 Environmental Design, General
- 0202 Architecture
- 0203 Interior Design
- 0204 Landscape Architecture
- 0205 Urban Architecture
- 0206 City, Community, and Regional Planning
- 0299 Other, Specify

**0300 AREA STUDIES**

- 0301 Asian Studies, General
- 0302 East Asian Studies
- 0303 South Asian (India, etc.) Studies
- 0304 Southeast Asian Studies
- 0305 African Studies
- 0306 Islamic Studies
- 0307 Russian and Slavic Studies
- 0308 Latin American Studies
- 0309 Middle Eastern Studies
- 0310 European Studies, General
- 0311 Eastern European Studies
- 0312 West European Studies
- 0313 American Studies
- 0314 Pacific Area Studies
- 0399 Other, Specify

**0400 BIOLOGICAL SCIENCES**

- 0401 Biology, General
- 0402 Botany, General
- 0403 Bacteriology
- 0404 Plant Pathology
- 0405 Plant Pharmacology
- 0406 Plant Physiology
- 0407 Zoology, General
- 0408 Pathology, Human and Animal
- 0409 Pharmacology, Human and Animal
- 0410 Physiology, Human and Animal
- 0411 Microbiology
- 0412 Anatomy
- 0413 Histology
- 0414 Biochemistry
- 0415 Biophysics
- 0416 Molecular Biology
- 0417 Cell Biology (Cytology, Cell Physiology)
- 0418 Marine Biology
- 0419 Biometrics and Biostatistics
- 0420 Ecology

- 0421 Entomology
- 0422 Genetics
- 0423 Radiobiology
- 0424 Nutrition, Scientific  
(exclude Nutrition on Home Economics  
and Dietetics)
- 0425 Neurosciences
- 0426 Toxicology
- 0427 Embryology
- 0499 Other, Specify

**0500 BUSINESS AND MANAGEMENT**

- 0501 Business and Commerce, General
- 0502 Accounting
- 0503 Business Statistics
- 0504 Banking and Finance
- 0505 Investments and Securities
- 0506 Business Management and Administration
- 0507 Operations Research
- 0508 Hotel and Restaurant Management
- 0509 Marketing and Purchasing
- 0510 Transportation and Public Utilities
- 0511 Real Estate
- 0512 Insurance
- 0513 International Business
- 0514 Secretarial Studies
- 0515 Personnel Management
- 0516 Labor and Industrial Relations
- 0517 Business Economics
- 0599 Other, Specify

**0600 COMMUNICATIONS**

- 0601 Communications, General
- 0602 Journalism (Printed Media)
- 0603 Radio/TV
- 0604 Advertising
- 0605 Communication Media  
(use of videotape, film, etc.,  
oriented specifically toward radio/TV)
- 0699 Other, Specify

**0700 COMPUTER AND INFORMATION SCIENCES**

- 0701 Computer and Information Sciences, General
- 0702 Information Sciences and Systems
- 0703 Data Processing
- 0704 Computer Programming
- 0705 Systems Analysis
- 0799 Other, Specify

**0800 EDUCATION**

- 0801 Education, General
- 0802 Elementary Education, general
- 0803 Secondary Education, general
- 0804 Junior high school education
- 0805 Higher education, general
- 0806 Junior and community college education
- 0807 Adult and continuing education
- 0808 Special education, general
- 0809 Administration of special education
- 0810 Education of the mentally retarded
- 0811 Education of the gifted
- 0812 Education of the deaf
- 0813 Education of the culturally disadvantaged
- 0814 Education of the visually handicapped
- 0815 Speech correction
- 0816 Education of the emotionally disturbed
- 0817 Remedial education
- 0818 Special learning disabilities
- 0819 Education of the physically handicapped
- 0820 Education of the multiple handicapped
- 0821 Social foundations (history and philosophy of education)
- 0822 Educational psychology (include learning theory)
- 0823 Pre-elementary education (kindergarten)
- 0824 Educational statistics and research
- 0825 Educational testing, evaluation, and measurement
- 0826 Student personnel (counseling and guidance)
- 0827 Educational administration
- 0828 Educational supervision
- 0829 Curriculum and instruction
- 0830 Reading education (methodology and theory)
- 0831 Art education (methodology and theory)
- 0832 Music education (methodology and theory)
- 0833 Mathematics education (methodology and theory)
- 0834 Science education (methodology and theory)
- 0835 Physical education
- 0836 Driver and safety education
- 0837 Health education (include family life education)
- 0838 Business, commerce, and distributive education
- 0839 Industrial arts, vocational, and technical education
- 0899 Other, specify

**0900 ENGINEERING**

- 0901 Engineering, General
- 0902 Aerospace, Aeronautical, and  
Astronautical Engineering
- 0903 Agricultural Engineering
- 0904 Architectural Engineering
- 0905 Bioengineering and Biomedical Engineering
- 0906 Chemical Engineering (include Petroleum  
refining)
- 0907 Petroleum Engineering (exclude Petroleum  
refining)
- 0908 Civil, Construction, and Transportation  
Engineering
- 0909 Electrical, Electronics, and Communications  
Engineering
- 0910 Mechanical Engineering
- 0911 Geological Engineering
- 0912 Geophysical Engineering
- 0913 Industrial and Management Engineering
- 0914 Metallurgical Engineering
- 0915 Materials Engineering
- 0916 Ceramic Engineering
- 0917 Textile Engineering
- 0918 Mining and Mineral Engineering
- 0919 Engineering Physics
- 0920 Nuclear Engineering
- 0921 Engineering Mechanics-
- 0922 Environmental and Sanitary Engineering
- 0923 Naval Architecture and Marine Engineering
- 0924 Ocean Engineering
- 0925 Engineering Technologies
- 0999 Other, Specify

**1000 FINE AND APPLIED ARTS**

- 1001 Fine Arts, General
- 1002 Art (Painting, Drawing, Sculpture)
- 1003 Art History and Appreciation
- 1004 Music (Performing, Composition, Theory)
- 1005 Music (Liberal Arts Program)
- 1006 Music History and Appreciation  
(Musicology)
- 1007 Dramatic Arts
- 1008 Dance
- 1009 Applied Design  
(Ceramics, Weaving, Textile Design,  
Fashion Design, Jewelry, Metalsmithing,  
Interior Decoration, Commercial Art)

- 1010 Cinematography
- 1011 Photography
- 1099 Other, Specify

**1100 FOREIGN LANGUAGES**

- 1101 Foreign Languages, General
- 1102 French
- 1103 German
- 1104 Italian
- 1105 Spanish
- 1106 Russian
- 1107 Chinese
- 1108 Japanese
- 1109 Latin
- 1110 Greek, classical
- 1111 Hebrew
- 1112 Arabic
- 1113 Indian (Asiatic)
- 1114 Scandinavian Languages
- 1115 Slavic Languages (other than Russian)
- 1116 African Languages (non-Semitic)
- 1199 Other, Specify

**1200 HEALTH PROFESSIONS**

- 1201 Health Professions, General
- 1202 Hospital and Health Care Administration
- 1203 Nursing
- 1204 Dentistry
- 1205 Dental Specialties
- 1206 Medicine
- 1207 Medical Specialties
- 1208 Occupational Therapy
- 1209 Optometry
- 1210 Osteopathic Medicine
- 1211 Pharmacy
- 1212 Physical Therapy
- 1213 Dental Hygiene
- 1214 Public Health
- 1215 Medical Record Librarianship
- 1216 Podiatry or Podiatric Medicine
- 1217 Biomedical Communication
- 1218 Veterinary Medicine
- 1219 Veterinary Medicine Specialties
- 1220 Speech Pathology and Audiology
- 1221 Chiropractic
- 1222 Clinical Social Work
- 1223 Medical Laboratory Technologies



- 1224 Dental Technologies
- 1225 Radiologic Technologies
- 1299 Other, Specify

**1300 HOME ECONOMICS**

- 1301 Home Economics, General
- 1302 Home Decoration and Home Equipment
- 1303 Clothing and Textiles
- 1304 Consumer Economics and Home Management
- 1305 Family Relations and Child Development
- 1306 Foods and Nutrition (include Dietetics)
- 1307 Institutional Management and Cafeteria Management
- 1399 Other, Specify

**1400 LAW**

- 1401 Law, General
- 1499 Other, Specify

**1500 LETTERS**

- 1501 English, General
- 1502 Literature, English
- 1503 Comparative Literature
- 1504 Classics
- 1505 Linguistics (include Phonetics, Semantics, and Philology)
- 1506 Speech, Debate, and Forensic Science (Rhetoric and Public Address)
- 1507 Creative Writing
- 1508 Teaching of English as a Foreign Language
- 1509 Philosophy
- 1510 Religious Studies (exclude Theological Professions)
- 1599 Other, Specify

**1600 LIBRARY SCIENCE**

- 1601 Library Science, General
- 1699 Other, Specify

**1700 MATHEMATICS**

- 1701 Mathematics, General
- 1702 Statistics, Mathematical and Theoretical
- 1703 Applied Mathematics
- 1799 Other, Specify

**1800 MILITARY SCIENCES**

- 1801 Military Science (Army)

- 1802 Naval Science (Navy, Marines)
- 1803 Aerospace Science (Air Force)
- 1899 Other, Specify

**1900 PHYSICAL SCIENCES**

- 1901 Physical Sciences, General
- 1902 Physics, General (exclude Biophysics)
- 1903 Molecular Physics
- 1904 Nuclear Physics
- 1905 Chemistry, General (exclude Biochemistry)
- 1906 Inorganic Chemistry
- 1907 Organic Chemistry
- 1908 Physical Chemistry
- 1909 Analytical Chemistry
- 1910 Pharmaceutical Chemistry
- 1911 Astronomy
- 1912 Astrophysics
- 1913 Atmospheric Sciences and Meteorology
- 1914 Geology
- 1915 Geochemistry
- 1916 Geophysics and Seismology
- 1917 Earth Sciences, General
- 1918 Paleontology
- 1919 Oceanography
- 1920 Metallurgy
- 1999 Other, Specify

**2000 PSYCHOLOGY**

- 2001 Psychology, General
- 2002 Experimental Psychology (animal and human)
- 2003 Clinical Psychology
- 2004 Psychology for Counseling
- 2005 Social Psychology
- 2006 Psychometrics
- 2007 Statistics in Psychology
- 2008 Industrial Psychology
- 2009 Developmental Psychology
- 2010 Physiological Psychology
- 2099 Other, Specify

**2100 PUBLIC AFFAIRS AND SERVICES**

- 2101 Community Services, General
- 2102 Public Administration
- 2103 Parks and Recreation Management
- 2104 Social Work and Helping Services  
(other than Clinical Social Work)

- 2105 Law Enforcement and Corrections
- 2106 International Public Service  
(other than Diplomatic Service)
- 2199 Other, Specify

**2200 SOCIAL SCIENCES**

- 2201 Social Sciences, General
- 2202 Anthropology
- 2203 Archeology
- 2204 Economics
- 2205 History
- 2206 Geography
- 2207 Political Science and Government
- 2208 Sociology
- 2209 Criminology
- 2210 International Relations
- 2211 Afro-American (Black Culture) Studies
- 2212 American Indian Cultural Studies
- 2213 Mexican-Indian Cultural Studies
- 2214 Urban Studies
- 2215 Demography
- 2299 Other, Specify

**2300 THEOLOGY**

- 2301 Theological Professions, General
- 2302 Religious Music
- 2303 Biblical Languages
- 2304 Religious Education
- 2399 Other, Specify

**4900 INTERDISCIPLINARY STUDIES**

- 4901 General Liberal Arts and Sciences
- 4902 Biological and Physical Sciences
- 4903 Humanities and Social Sciences
- 4904 Engineering and Other Disciplines
- 4999 Other, Specify

**5000 BUSINESS AND COMMERCE TECHNOLOGIES**

- 5001 Business and Commerce Technologies,  
General
- 5002 Accounting Technologies
- 5003 Banking and Finance Technologies
- 5004 Marketing, Distribution, Purchasing, Business,  
and Industrial Management Technologies
- 5005 Secretarial Technologies  
(include Office Machines Training)

- 5006 Personal Service Technologies  
(Stewardess, Cosmetologist, etc.)
- 5007 Photography Technologies
- 5008 Communication and Broadcasting  
Technologies (Radio/TV, Newspapers)
- 5009 Printing and Lithography Technologies
- 5010 Hotel and Restaurant Management  
Technologies
- 5011 Transportation and Public Utility  
Technologies
- 5012 Applied Arts, Graphic Arts, and Fine Arts  
Technologies (include advertising design)
- 5099 Other, Specify

**5100 DATA PROCESSING TECHNOLOGIES**

- 5101 Data Processing Technologies, General
- 5102 Key Punch Operator and Other Input  
Preparation Technologies
- 5103 Computer Programmer Technologies
- 5104 Computer Operator and Peripheral Equipment  
Operation Technologies
- 5105 Data Processing Equipment Maintenance  
Technologies
- 5199 Other, Specify

**5200 HEALTH SERVICES AND PARAMEDICAL  
TECHNOLOGIES**

- 5201 Health Services Assistant Technologies,  
General
- 5202 Dental Assistant Technologies
- 5203 Dental Hygiene Technologies
- 5204 Dental Laboratory Technologies
- 5205 Medical or Biological Laboratory Assistant  
Technologies
- 5206 Animal Laboratory Assistant Technologies
- 5207 Radiologic Technologies (X-Ray, etc.)
- 5208 Nursing R.N. (less than 4-year program)
- 5209 Nursing, Practical (L.P.N. or L.V.N.—less  
than 4-year program)
- 5210 Occupational Therapy Technologies
- 5211 Surgical Technologies
- 5212 Optical Technologies (include Ocular Care,  
Ophthalmic, Optometric Technologies)
- 5213 Medical Record Technologies
- 5214 Medical Assistant and Medical Office  
Assistant Technologies
- 5215 Inhalation Therapy Technologies

- 5216 Psychiatric Technologies (include Mental Health Aide Programs)
- 5217 Electro Diagnostic Technologies (include E.K.G., E.E.G., etc.)
- 5218 Institutional Management Technologies (Rest Home, etc.)
- 5219 Physical Therapy Technologies
- 5299 Other, Specify

**5300 MECHANICAL AND ENGINEERING TECHNOLOGIES**

- 5301 Mechanical and Engineering Technologies, General
- 5302 Aeronautical and Aviation Technologies
- 5303 Engineering Graphics (Tool and Machine Drafting and Design)
- 5304 Architectural Drafting Technologies
- 5305 Chemical Technologies (include Plastics)
- 5306 Automotive Technologies
- 5307 Diesel Technologies
- 5308 Welding Technologies
- 5309 Civil Technologies (Surveying, Photogrammetry, etc.)
- 5310 Electronics and Machine Technologies (TV, Appliance, Office Machine Repair, etc.)
- 5311 Electromechanical Technologies
- 5312 Industrial Technologies
- 5313 Textile Technologies
- 5314 Instrumentation Technologies
- 5315 Mechanical Technologies
- 5316 Nuclear Technologies
- 5317 Construction and Building Technologies (Carpentry, Electrical Work, Plumbing, Sheet Metal, Air Conditioning, Heating, etc.)
- 5399 Other, Specify

**5400 NATURAL SCIENCE TECHNOLOGIES**

- 5401 Natural Science Technologies, General
- 5402 Agriculture Technologies (include Horticulture)
- 5403 Forestry and Wildlife Technologies (include Fisheries)
- 5404 Food Services Technologies
- 5405 Home Economics Technologies
- 5406 Marine and Oceanographic Technologies
- 5407 Laboratory Technologies, General

- 5408 Sanitation and Public Health Inspection  
Technologies (Environmental Health  
Technologies)
- 5499 Other, Specify

**5500 PUBLIC SERVICE RELATED TECHNOLOGIES**

- 5501 Public Service Technologies, General
- 5502 Bible Study or Religion-Related Occupations
- 5503 Education Technologies (Teacher Aide and  
2-year Teacher Training Programs)
- 5504 Library Assistant Technologies
- 5505 Police, Law Enforcement, Corrections  
Technologies
- 5506 Recreation and Social Work Related  
Technologies
- 5507 Fire Control Technology
- 5508 Public Administration and Management  
Technologies
- 5599 Other, Specify

## Alphabetical Listing of HEGIS Discipline Specialities

### Section I:

#### CONVENTIONAL ACADEMIC SUBDIVISIONS OF KNOWLEDGE AND TRAINING

<i>Title</i>	<i>Code</i>
Accounting . . . . .	0502
Administration, business . . . . .	0506
Administration, educational . . . . .	0827
Administration, public . . . . .	2102
Administration, special education . . . . .	0809
Adult education . . . . .	0807
Advertising . . . . .	0604
Aeronautical engineering . . . . .	0902
Aerospace engineering . . . . .	0902
Aerospace science . . . . .	1803
African languages (non-Semitic) . . . . .	1116
African studies . . . . .	0305
Afro-American studies . . . . .	2211
Agricultural business . . . . .	0112
Agricultural economics . . . . .	0111
Agricultural engineering . . . . .	0903
Agricultural management . . . . .	0110
Agriculture, general . . . . .	0101
Agriculture technologies . . . . .	0116
Agronomy . . . . .	0102
American Indian cultural studies . . . . .	2212
American studies . . . . .	0313
Analytical chemistry . . . . .	1909
Anatomy . . . . .	0412
Animal science . . . . .	0104
Anthropology . . . . .	2202
Applied Design . . . . .	1009
Applied mathematics . . . . .	1703
Arabic . . . . .	1112
Archeology . . . . .	2203
Architectural engineering . . . . .	0904
Architecture . . . . .	0202
Architecture, naval . . . . .	0923
Art . . . . .	1002
Art appreciation . . . . .	1003
Art, commercial . . . . .	1009
Art education . . . . .	0831
Art history . . . . .	1003

Asian studies, general	0301
Astronautical engineering	0902
Astronomy	1911
Astrophysics	1912
Atmospheric sciences	1913
Audiology	1220
Bacteriology	0403
Banking	0504
Biblical languages	2303
Biochemistry	0414
Bioengineering	0905
Biological and physical sciences (interdisciplinary)	4902
Biology, cellular	0417
Biology, general	0401
Biology, marine	0418
Biology, molecular	0416
Biomedical communication	1217
Biomedical engineering	0905
Biometrics	0419
Biophysics	0415
Biostatistics	0419
Black culture studies	2211
Botany, general	0402
Business administration	0506
Business, agricultural	0112
Business economics	0517
Business education	0838
Business, general	0501
Business, international	0513
Business management	0506
Business statistics	0503
Cafeteria management	1307
Catalan	1199
Cell biology	0417
Cell physiology	0417
Ceramic engineering	0916
Ceramics	1009
Chemical engineering	0906
Chemistry, general	1905
Child development	1305
Chinese	1107
Chiropractic	1221
Cinematography	1010
City planning	0206
Civil engineering	0908



Classics	1504
Clinical psychology	2003
Clinical social work	1222
Clothing	1303
Commerce education	0838
Commerce, general	0501
Commercial art	1009
Communication media	0605
Communications, general	0601
Communications engineering	0909
Community college education	0806
Community planning	0206
Community services, general	2101
Comparative literature	1503
Computer programming	0704
Computer sciences, general	0701
Construction engineering	0908
Consumer economics	1304
Continuing education	0807
Corrections	2105
Counseling, Educational	0826
Counseling, psychology for	2004
Creative writing	1507
Criminology	2209
Crop management	0102
Curriculum	0829
Cytology	0417
Dairy sciences	0105
Dance	1008
Danish	1114
Data processing	0703
Debate	1506
Demography	2215
Dental hygiene	1213
Dental specialties	1205
Dental technologies	1224
Dentistry, D.D.S. or D.M.D. degree	1204
Developmental psychology	2009
Dietetics	1306
Distributive education	0838
Dramatic arts	1007
Drawing	1002
Driver education	0836
Earth sciences, general	1917
East Asian studies	0302

Eastern European studies	0311
Ecology	0420
Economics	2204
Economics, agricultural	0111
Economics, business	0517
Education of the culturally disadvantaged	0813
Education of the deaf	0812
Education of the emotionally disturbed	0816
Education, general	0801
Education of the gifted	0811
Education of mentally retarded	0810
Education of the multiple handicapped	0820
Education of the physically handicapped	0819
Education, religious	2304
Education of the visually handicapped	0814
Educational administration	0827
Educational evaluation	0825
Educational measurement	0825
Educational psychology	0822
Educational research	0824
Educational statistics	0824
Educational supervision	0828
Educational testing	0825
Electrical engineering	0909
Electronics engineering	0909
Elementary education, general	0802
Embryology	0427
Engineering, general	0901
Engineering mechanics	0921
Engineering and other disciplines (interdisciplinary)	4904
Engineering physics	0919
Engineering technologies	0925
English as a foreign language	1508
English, general	1501
English, literature	1502
Entomology	0421
Environmental design, general	0201
Environmental engineering	0922
European studies, general	0310
Experimental psychology (animal and human)	2002
Family life education	0837
Family relations	1305
Farm management	0110
Fashion design	1009
Field crops	0102
Finance	0504

Fine arts, general	1001
Finnish	1199
Fish management	0107
Floriculture	0109
Foods and nutrition	1306
Food science	0113
Food technology	0113
Foreign languages, general	1101
Forensic science	1506
Forestry	0114
Forestry technologies	0116
French	1102
Fruit production	0108
Game management	0107
General liberal arts and sciences (interdisciplinary)	4901
Genetics	0422
Geochemistry	1915
Geography	2206
Geological engineering	0911
Geology	1914
Geophysical engineering	0912
Geophysics	1916
German	1103
Government	2207
Greek, classical	1110
Guidance, education	0826
Health care administration	1202
Health education	0837
Health professions, general	1201
Hebrew	1111
Helping services	2104
Higher education, general	0805
Histology	0413
History	2205
History of education	0821
Home decoration	1302
Home economics, general	1301
Home equipment	1302
Home management	1304
Horticulture	0108
Hospital administration	1202
Hotel management	0508
Humanities and social sciences (interdisciplinary)	4903
Husbandry, animal	0104
Husbandry, dairy	0105

Ichthyology	0499
India studies	0303
Indian (Asiatic)	1113
Industrial arts education	0839
Industrial engineering	0913
Industrial psychology	2008
Industrial relations	0516
Information sciences	0702
Information sciences, general	0701
Information systems	0702
Inorganic chemistry	1906
Institutional management	1307
Instruction	0829
Insurance	0512
Interior decoration	1009
Interior design	0203
International business	0513
International public service	2106
International relations	2210
Investments	0505
Islamic studies	0306
Italian	1104
Japanese	1108
Jewelry	1009
Journalism	0602
Junior college education	0806
Junior high school education	0804
Kindergarten education	0823
Korean	1199
Labor relations	0516
Landscape architecture	0204
Latin	1109
Latin American studies	0308
Law enforcement	2105
Law, general	1401
Learning theory	0822
Liberal arts and sciences (interdisciplinary)	4901
Library science, general	1601
Limnology	0499
Linguistics	1505
Literature, comparative	1503
Literature, English	1502
Management, business	G506

Management, engineering	0913
Marine biology	0418
Marine engineering	0923
Marketing	0509
Materials engineering	0915
Mathematics, applied	1703
Mathematics, education	0833
Mathematics, general	1701
Mathematics, statistics	1702
Mechanical engineering	0910
Medical laboratory technologies	1223
Medical record librarianship	1215
Medical specialties	1207
Medicine, M.D. degree	1206
Metallurgical engineering	0914
Metallurgy	1920
Metalsmithing	1009
Meteorology	1913
Mexican-American cultural studies	2213
Microbiology	0411
Middle Eastern studies	0309
Military science	1801
Mineral engineering	0918
Mining engineering	0918
Molecular biology	0416
Molecular physics	1903
Music (liberal arts program)	1005
Music appreciation	1006
Music, composition	1004
Music education	0832
Music history	1006
Music, performing	1004
Music, theory	1004
Musicology	1006
Natural resources management	0115
Naval architecture	0923
Naval science	1802
Neurosciences	0425
Norwegian	1114
Nuclear engineering	0920
Nuclear physics	1904
Nursery science	0109
Nursing (baccalaureate and higher programs)	1203
Nutrition, scientific	0424
Occupational therapy	1208

Ocean engineering	0924
Oceanography	1919
Operations research	0507
Optometry	1209
Organic chemistry	1907
Ornamental horticulture	0109
Ornithology	0499
Osteopathic medicine, D.O. degree	1210
Pacific area studies	0314
Painting	1002
Paleontology	1918
Parasitology	0499
Park management	2103
Pathology, animal	0408
Pathology, human	0408
Pathology, plant	0404
Personnel management	0515
Petroleum engineering	0907
Petroleum refining	0906
Pharmaceutical chemistry	1910
Pharmacology, animal	0409
Pharmacology, human	0409
Pharmacology, plant	0405
Pharmacy	1211
Philology	1505
Philosophy	1509
Philosophy of education	0821
Phonetics	1505
Photography	1011
Physical chemistry	1908
Physical education	0835
Physical sciences, general	1901
Physical therapy	1212
Physics, general	1902
Physiological psychology	2010
Physiology, animal	0410
Physiology, human	0410
Physiology, plant	0406
Plant pathology	0404
Plant pharmacology	0405
Plant physiology	0406
Podiatry	1216
Political Science	2207
Poultry science	0106
Pre-elementary education	0803
Programming, computer	0704

Psychology, clinical	2003
Psychology for counseling	2004
Psychology, developmental	2009
Psychology, education	0822
Psychology, general	2001
Psychology, industrial	2008
Psychology, physiological	2010
Psychology, social	2005
Psychometrics	2006
Public address	1506
Public administration	2102
Public health	1214
Public utilities	0510
Purchasing	0509
Radio	0603
Radiobiology	0423
Radiologic technologies	1225
Range management	0117
Reading education	0830
Real estate	0511
Recreation management	2103
Regional planning	0206
Rehabilitation services	1222
Religious education	2304
Religious music	2302
Religious studies	1510
Remedial education	0817
Restaurant management	0508
Rhetoric	1506
Russian	1106
Russian studies	0307
Safety education	0836
Sanitary engineering	0922
Sanskrit	1199
Scandinavian languages	1114
Science education	0834
Sculpture	1002
Secondary education, general	0803
Secretarial studies	0514
Securities	0505
Seismology	1916
Semantics	1505
Slavic languages (other than Russian)	1115
Slavic studies	0307
Social foundations of education	0821
Social sciences, general	2201

Social psychology	2005
Social work	2104
Sociology	2208
Soil conservation	0103
Soil management	0103
Soil science	1013
South Asian studies	0303
Southeast Asian studies	0304
Spanish	1105
Special education, general	0808
Speech learning disabilities	0818
Speech	1506
Speech correction	0815
Speech pathology	1220
Statistics, mathematical and theoretical	1702
Statistics in psychology	2007
Student personnel	0826
Swedish	1114
Systems analysis	0705
Systems, information	0702
Teaching of English as a foreign language	1508
Technical education	0839
Television	0603
Textile design	1009
Textile engineering	0917
Textiles, home economics	1303
Theological professions, general	2301
Toxicology	0426
Transportation	0510
Transportation engineering	0908
Urban architecture	0205
Urban studies	2114
Vegetable production	0108
Veterinary medicine, D.V.M. degree	1218
Veterinary medicine specialties	1219
Vietnamese	1199
Vocational education	0839
Weaving	1009
West European studies	0312
Wildlife management	0107
Writing, creative	1507
Zoology, general	0407



**Section II:**

**TECHNOLOGICAL AND OCCUPATIONAL CURRICULUMS LEADING TO  
ASSOCIATE DEGREES AND OTHER AWARDS BELOW THE  
BACCALAUREATE**

<i>Title</i>	<i>Code</i>
Accounting technologies .....	5002
Advertising design technologies .....	5012
Advertising technologies .....	5004
Aeronautical technologies .....	5302
Agriculture technologies .....	5402
Air conditioning technologies .....	5317
Airport management technologies .....	5004
Animal laboratory assistant technologies .....	5206
Appliance repair technologies .....	5310
Applied arts technologies .....	5012
Architectural drafting technologies .....	5304
Automotive technologies .....	5306
Aviation technologies .....	5302
Banking technologies .....	5003
Bible study .....	5502
Biological laboratory assistant technologies .....	5205
Broadcasting technologies .....	5008
Building technologies .....	5317
Business management technologies .....	5004
Business technologies, general .....	5001
Carpentry technologies .....	5317
Chemical technologies .....	5305
Civil technologies .....	5309
Commerce technologies .....	5001
Communications technologies .....	5008
Computer operator technologies .....	5104
Computer, peripheral equipment operation technologies .....	5104
Computer program technologies .....	5103
Construction technologies .....	5317
Corrections technologies .....	5305
Cosmetologist .....	5006
Data processing equipment maintenance technologies .....	5105
Data processing technologies, general .....	5101
Dental assistant technologies .....	5202

Dental hygiene technologies	5203
Dental laboratory technologies	5204
Diesel technologies	5307
Distribution technologies	5004
Drafting, architectural	5304
Education technologies	5503
Electrician technologies	5317
Electrodiagnostic technologies	5217
Electromechanical technologies	5311
Electronics and machine technologies	5310
Engineering graphics	5303
Engineering technologies, general	5301
Environmental health technologies	5408
Finance technologies	5003
Fine arts technologies	5012
Fire control technology	5507
Fisheries technologies	5403
Food services technologies	5404
Forestry technologies	5403
Graphic arts technologies	5012
Health services assistant technologies, general	5201
Heating technologies	5317
Home economics technologies	5405
Horticulture technologies	5402
Hospital food service technologies	5404
Hotel management technologies	5010
Industrial management technologies	5004
Industrial technologies	5312
Inhalation therapy technologies	5215
Input preparation technologies	5102
Institutional management technologies	5218
Instrumentation technologies	5314
Insurance technologies	5004
Key punch operator technologies	5102
Laboratory technologies, general	5407
Landscape technologies	5402
Law enforcement technologies	5505
Library assistant technologies	5504
Lithography technologies	5009

Machine drafting and design technologies	5303
Machine repair technologies	5310
Marina equipment technologies	5004
Marine technologies	5406
Marketing technologies	5004
Mechanical technologies	5315
Mechanical technologies, general	5301
Medical assistant technologies	5214
Medical laboratory assistant technologies	5205
Medical office assistant technologies	5214
Medical record technologies	5213
Mental health aide programs	5216
Natural science technologies, general	5401
Newspaper communication technologies	5008
Nuclear technologies	5316
Nursing, practical (L.P.N. or L.V.N.)	5209
Nursing R.N. preparation	5208
Occupational therapy technologies	5210
Oceanographic technologies	5406
Ocular care technologies	5212
Office machine repair technologies	5310
Office machine training	5005
Ophthalmic technologies	5212
Optical technologies	5212
Optometric technologies	5212
Personal service technologies	5006
Personnel management technologies	5004
Photogrammetry technologies	5309
Photography technologies	5007
Physical therapy technology	5219
Plastics technologies	5305
Plumbing technologies	5317
Police technologies	5505
Printing technologies	5009
Programmer technologies	5103
Psychiatric technologies	5216
Public administration and management technologies	5508
Public health inspection technologies	5408
Public service technologies, general	5501
Public utility technologies	5011
Purchasing technologies	5004

Radio broadcasting technologies . . . . .	5008
Radio repair technologies . . . . .	5310
Radiologic technologies . . . . .	5207
Real estate technologies . . . . .	5004
Recreation technologies . . . . .	5506
Religion related occupations . . . . .	5502
Rest home management technology . . . . .	5218
Restaurant management technologies . . . . .	5010
Sales technologies . . . . .	5004
Sanitation technologies . . . . .	5408
Secretarial technologies . . . . .	5005
Sheet metal technologies . . . . .	5317
Social work related technologies . . . . .	5506
Stewardess preparation . . . . .	5006
Surgical technologies . . . . .	5211
Surveying technologies . . . . .	5309
Teacher aide preparation . . . . .	5503
Television broadcasting technologies . . . . .	5008
Television repair technologies . . . . .	5310
Textile technologies . . . . .	5313
Tool design technologies . . . . .	5303
Transportation technologies . . . . .	5011
Welding technologies . . . . .	5308
Wildlife technologies . . . . .	5403
X-ray technologies . . . . .	5207

## Appendix C

### Religious Affiliation of Institutions

Advent Christian Church  
African Methodist Episcopal  
African Methodist Episcopal Zion Church  
American Baptist  
American Evangelical Lutheran Zion  
Church  
American Lutheran  
American Lutheran and Lutheran  
Church in America  
American Missionary Association  
Assemblies of God Church  
Baptist  
Brethren Church  
Brethren in Christ Church  
Christian and Missionary Alliance  
Church  
Christian Church (Disciples of Christ)  
Christian Methodist Episcopal  
Christian Reformed Church  
Church of Christ  
Church of God  
Church of God in Christ  
Church of New Jerusalem  
Church of the Brethren  
Church of the Nazarene  
Cumberland Presbyterian  
Evangelical and Reformed Church  
Evangelical Congregational Church  
Evangelical Covenant Church of America  
Evangelical Free Church of America  
Evangelical Lutheran Church  
Evangelical United Brethren  
Free Methodist  
Free Will Baptist Church  
Friends  
Friends United Meeting  
General Conference Mennonite Church  
Greek Orthodox  
Interdenominational  
Jewish  
Latter-Day Saints  
Lutheran Church in America

Lutheran Church - Missouri Synod  
Mennonite Brethren Church  
Mennonite Church  
Moravian Church  
Multiple Protestant denominations  
North American Baptist  
Other Protestant  
Pentecostal Holiness Church  
Presbyterian, U.S.  
Presbyterian, U.S. and United  
Presbyterian, U.S.A.  
Protestant Episcopal  
Reformed Church in America  
Reformed Episcopal Church  
Reformed Presbyterian Church  
Reorganized Latter-Day Saints Church  
Roman Catholic  
Russian Orthodox  
Seventh-Day Adventists  
Seventh-Day Baptist Church  
Southern Baptist  
Undenominational  
Unitarian Universalist  
United Brethren Church  
United Christian Missionary Society  
United Church of Christ  
United Lutheran Church  
United Methodist  
United Missionary Church  
United Presbyterian, U.S.A.  
Wesleyan Church  
Wisconsin Evangelical Lutheran Synod  
Young Men's Christian Association  
Other

**Appendix D**  
**ROOM DATA DEFINITIONS AND CODES**  
**STANDARD ROOM USE CATEGORIES**

**Summary**

**ASSIGNABLE AREA**

**100 CLASSROOM FACILITIES**

- 110 Classroom
- 115 Classroom Service

**200 LABORATORY FACILITIES**

- 210 Class Laboratory
- 215 Class Laboratory Service
  
- 220 Special Class Laboratory
- 225 Special Class Laboratory Service
  
- 230 Individual Study Laboratory
- 235 Individual Study Laboratory Service
- 250 Non-Class Laboratory
- 255 Non-Class Laboratory Service

**300 OFFICE FACILITIES**

- 310 Office
- 315 Office Service
  
- 350 Conference Room (Office Related)
- 355 Conference Room Service (Office Related)

**400 STUDY FACILITIES**

- 410 Reading/Study Room
  
- 420 Stack
  
- 430 Open Stack Reading Room
  
- 440 Processing Room
  
- 455 Study Service

500 SPECIAL USE FACILITIES

- 510 Armory
- 515 Armory Service
  
- 520 Athletic/Physical Education
- 523 Athletic Facilities Spectator Seating
- 525 Athletic/Physical Education Service
  
- 530 Audio/Visual, Radio, TV
- 535 Audio/Visual, Radio, TV Service
  
- 540 Clinic (Non-Health Professions)
- 545 Clinic Service (Non-Health Professions)
  
- 550 Demonstration
- 555 Demonstration Service
  
- 560 Field Building
  
- 570 Animal Quarters
- 575 Animal Quarters Service
  
- 580 Greenhouse
- 585 Greenhouse Service
  
- 590 Other (All Purpose)

600 GENERAL USE FACILITIES

- 610 Assembly
- 615 Assembly Service
  
- 620 Exhibition
- 625 Exhibition Service
  
- 630 Food Facilities
- 635 Food Facilities Service
  
- 650 Lounge
- 655 Lounge Service
  
- 660 Merchandising Facilities
- 665 Merchandising Facilities Service
  
- 670 Recreation
- 675 Recreation Service



680 Meeting Room (See also 350)

685 Meeting Room Service

690 Locker Room

#### 700 SUPPORTING FACILITIES

710 Data Processing/Computer

715 Data Processing/Computer Service

720 Shop

725 Shop Service

730 Storage

735 Storage Service

740 Vehicle Storage Facility

745 Vehicle Storage Facility Service

750 Central Food Stores

760 Central Laundry

#### 800 HEALTH CARE FACILITIES

810 Patient Bedroom

820 Patient Bath

830 Nurse Station

840 Surgery

850 Treatment

860 Service Laboratory

870 Supplies

880 Public Waiting

895 Health Care Service

900 RESIDENTIAL FACILITIES<sup>2</sup>

910 Sleep/Study Without Toilet/Bath  
919 Toilet/Bath

920 Sleep/Study with Toilet/Bath

935 Sleep/Study Service

950 House

970 Apartment  
975 Apartment Service

000 UNCLASSIFIED FACILITIES

050 Inactive Area<sup>3</sup>

060 Alteration or Conversion Area

070 Unfinished Area

NONASSIGNABLE AREA

Note: The following categories are included to complete the list of room use categories but are not recommended for collection purposes. Institutions collecting nonassignable area data may find them useful for plant management purposes. See Section IV for complete definitions and descriptions of these categories.

WWW CIRCULATION AREA

XXX CUSTODIAL AREA

YYY MECHANICAL AREA

ZZZ STRUCTURAL AREA

<sup>2</sup>In the coding of individual rooms and thus in tabulations at the 3-digit level of detail, 910 does not include 919, and 970 does not include 975. In reports tabulated at the 2-digit level, however, 910 would include 919, and 970 would include 975, just as all other XXO codes would then include the here-unlisted service categories coded XX5. (Note that the here-listed service categories coded 455, 895, and 935 are deliberately so coded, so that they will appear separately as additive items in reports tabulated at the 2-digit level of detail.)

<sup>3</sup>Note that an unused room which is clearly an office but not assigned to any program could be coded 310 with program code 8.1.

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## INDEX

	Page
Academic Administration .....	101
Academic Calendar	
See: "Predominant Calendar System" .....	5
Academic Department .....	1
Academic Departments, Staff	
See: "Staff in Academic Departments" .....	19
Academic Disciplines, Departments, etc. ....	21
Academic Rank	
See: "Faculty" .....	11
Academic Staff	
See: "Faculty" .....	11
Academic Support Program .....	101
Accepted, Number .....	21
Accounts Payable and Accrued Expenses .....	79
Accounts Receivable .....	79
Accreditation .....	1
Accrual Accounting .....	80
Accrued Expenses	
See: "Accounts Payable" .....	79
Accrued Withheld Payroll Tax	
See: "Accounts Payable" .....	79
Activity	
See: "Occupational Activity Category" .....	105
Activity Measures	
See: "Program Measures" .....	107
Additions .....	80
Address .....	1
Address, Billing .....	21
Address, Business (Campus) .....	7
Address, Permanent (Staff) .....	7
Address, Permanent (Students) .....	21
Address, Present (Staff) .....	7
Address, Present (Students) .....	21
Administrative .....	7
Administrative Department .....	1
Administrative Titles .....	7
Admission Action .....	22
Admission Action, Date .....	22
Admission Requirements .....	1
Admission Status .....	22
Affiliation	
See: "Control or Affiliation" .....	2

Agency Funds	80
See also: "Fund Groups"	88
Allowance for Doubtful Accounts	80
Allowance for Doubtful Loans	80
Alteration or Conversion Area	45
American Indian	24
Ancillary Support	101
Animal Quarters	45
Animal Quarters Service Facilities	45
Annuity and Life Income Funds	80
See also: "Assets"	80
"Fund Balance Accounts"	87
"Fund Groups"	88
"Payments on Annuity and Life Income"	94
Apartment	45
Apartment Service Facilities	45
Application	23
Application, Number	23
Appointment, Effective Date	8
Appointment, Expiration Date	8
Appointment, Length	8
Appointment, Title	8
Appointment, Type	8
Appropriations, Governmental	
See: "Government Appropriations"	90
Area, Unassigned	
See: "Inactive Area"	61
Armory	46
Armory Service Facilities	46
Asian American	24
Assembly Facilities	46
Assembly Service Facilities	46
Assets	80
See also: "Balance Sheet Category"	82
Assignable Area	46
Assignable Square Feet	47
Assignment	8
See also: "Manpower Assignment Classi- fication"	105
Athletic Facilities Spectator Seating	47
Athletic/Physical Education Facilities	47
Athletic/Physical Education Service Facilities	47



Athletics, Intercollegiate	
See: "Intercollegiate Athletics" . . . . .	104
Athletics, Intramural	
See: "Intramural Athletics" . . . . .	105
Attendance Status . . . . .	23
Audio/Visual, Radio, TV Facilities . . . . .	47
Audio/Visual, Radio, TV Service Facilities . . . . .	48
Auxiliary Enterprises . . . . .	2, 81
See also: "Source of Funds" . . . . .	97
Availability	
See: "Space Availability" . . . . .	71
Average Room Utilization Rate . . . . .	48
Average Section Size . . . . .	48
Average Station Occupancy Ratio . . . . .	48
Average Station Utilization Rate . . . . .	49
Balance Sheet Category . . . . .	82
Balances of Endowment Funds	
See: "Fund Balance Accounts" . . . . .	87
Balances of Quasi-Endowment Funds	
See: "Fund Balance Accounts" . . . . .	87
Balances of Term Endowment Funds	
See: "Fund Balance Accounts" . . . . .	87
Bath Facilities	
See: "Toilet/Bath Facilities" . . . . .	75
Bedroom	
See: "Patient Bedroom" . . . . .	67
Beginning Year Balance . . . . .	82
Beneficiary Group Measures . . . . .	101
Benefits in Kind . . . . .	13
Billing Address, Students	
See: "Address, Billing" . . . . .	21
Birth Date, Staff . . . . .	8
Birth Date, Students . . . . .	23
Birth Place, Staff . . . . .	8
Birth Place, Students . . . . .	23
Black American . . . . .	24
Board Policies . . . . .	101
Books and Supplies Costs . . . . .	23
Broadcast Radio Instruction . . . . .	36
Broadcast, TV Instruction . . . . .	35
Budgeting, Program	
See: "Program Budgeting" . . . . .	106
Building Capacity . . . . .	49
Building Data . . . . .	49
Building Inventory . . . . .	49
Building Programming . . . . .	50
Buildings . . . . .	49, 82

Business Address	
See: "Address, Business (Campus)"	7
Business Address, Staff	
See: "Address, Business (Campus)"	7
Calculated Capacity of a Dining Facility	50
Calendar	
See: "Predominant Calendar System"	5
Candidate Status	
See: "Pre-Accreditation Status"	4
Capacity, Building	
See: "Building Capacity"	49
Capacity, Classroom	
See: "Classroom Capacity"	52
Capacity, Class Laboratory	
See: "Class Laboratory Capacity"	51
Capacity, Design	
See: "Design Capacity"	56
Capacity, Dining Facility	
See: "Calculated Capacity of a Dining Facility"	50
Capital Costs	82
Capital Development Program	101
Capital Equipment	93
Capital Investment Expenditures	82
Career Choice	24
Cash	83
Cash, Petty	
See: "Petty Cash"	94
Central Food Stores	50
Central Laundry Facilities	50
Chicano	24
Circulation Area	63
Citizenship or Residence Status	9
Civil Rights Racial/Ethnic Categories	24
Class	35
Class Laboratory	50
Class Laboratory Capacity	51
Class Laboratory Hour of Instruction	51
Class Laboratory Service Facilities	51
Classroom	51
Classroom Capacity	52
Classroom Hour of Instruction	52
Classroom Service	52
Classroom Type	52
Clerical Rank	101
Clerical Staffing Policy	102

Clinic	
See: "Dental Clinic" .....	56
Clinic Facilities (Non-Health Professions) .....	53
Clinic Service Facilities (Non-Health Professions) .....	53
Closed Circuit Audio Instruction .....	36
Closed Circuit TV Instruction .....	35
College Previously Attended .....	25
College Previously Attended, Type .....	25
Common-Interest Group .....	102
Commuter Student .....	25
Compensation .....	9
Comprehensive Plan .....	102
Computer Facility	
See: "Data Processing/Computer" .....	54
Condition (of Buildings) .....	53
Conference, Institute and/or Workshop .....	35
Conference Room (Office Related) .....	54
Conference Room Service Facilities (Office Related) .....	54
Construction Area .....	54
Construction, Year	
See: "Year of Construction" .....	78
Contact Hours (Faculty)	
See: "Faculty Contact Hours" .....	11
Contact Hours, Weekly	
See: "Weekly Contact Hours" .....	44
Continuing Employee .....	14
Contract Board Students .....	25
Contract Term	
See: "Employee, Contract Term" .....	10
Contributed Services .....	9
Control or Affiliation .....	2
Conversion Area	
See: "Alteration or Conversion Area" .....	45
Correspondence Course and/or Independent Study .....	35
Correspondent Status .....	4
Cost Accounting .....	83
Cost Centers .....	83
Cost Finding Principles .....	102
Cost Types for Analysis .....	83
Course .....	25
Course Assignment(s) .....	9
Course Characteristics .....	25
Course Credit Hours .....	26

Course Credit Hours Attributable to "Other" Instruction	26
Course Enrollment	26
Course Identifier	26
Course Level	26
Course Work, Current	26
Course Work, Previous	27
Credit Hours Equivalents, Number	27
Credit Hours, Number	27
Credit Hours, Taught	9
Credit Quality Points Earned, Current Term	27
Credits Accepted, Previous College	27
Credits Accepted for Quality Points, Previous College	28
Credits Attempted for Quality Points, Current Institution	28
Credits Earned, Current Term	28
Cumulative Credits	28
Cumulative Credits, Current Institution	28
Cumulative Quality Points	28
Cumulative Quality Points, Current Institution	28
Current Fund Revenue	
See: "Revenue, Current Fund"	89
Current Funds	97
Current Funds Expended	8
Current Funds Expenditures	84
Current Funds Expenditures, Functional Classification	84
See: "Functional Classification"	87
Current Funds Restricted	
See: "Assets"	80
"Fund Balance Accounts"	87
"Fund Restrictions"	89
Current Funds Revenue Accounts	
See: "Revenue Accounts, Current Funds"	96
Custodial Area	64
Data Element Dictionary	102
Data Processing/Computer Service Facilities	55
Date Institution Was Established	2
Date of Registration	
See: "Registration Date"	38
Date Post-Secondary or College Work First Offered	2
Dates of Attendance	28
Deductions	84

Deferred Charges	
See: "Prepaid Expenses and Deferred Charges" . . . . .	95
Deferred Income	
See: "Income, Deferred" . . . . .	91
Deferred Revenue	
See: "Revenue Deferred" . . . . .	97
Degree Conferred . . . . .	28
Degree, Highest	
See: "Highest Academic Degree or Diploma" . . . . .	13
Degree, Major Field	
See: "Academic Discipline" . . . . .	21
Degree of Privacy . . . . .	55
Degree, Previous Highest	
See: "Highest Academic Degree or Diploma" . . . . .	13
Degree Program . . . . .	29
Degree Sought . . . . .	29
Demolition (of Buildings) . . . . .	53
Demonstration Facilities . . . . .	55
Demonstration Service Facilities . . . . .	55
Dental Clinic . . . . .	56
Dental Clinic Service Facilities . . . . .	56
Department . . . . .	2
Department, Academic	
See: "Academic Department" . . . . .	1
Department, Administrative	
See: "Administrative Department" . . . . .	1
Department Entering . . . . .	29
Departmental Integrity . . . . .	56
Departmental Research . . . . .	84
Dependent, . . . . .	9, 29
Deposit . . . . .	84
Deposit on Purchases . . . . .	85
Descriptor . . . . .	102
Design Capacity . . . . .	56
Design Development . . . . .	56
Designated Funds . . . . .	89
Designed Seating Capacity . . . . .	56
Direct Cost . . . . .	83
Disability	
See: "Physical Disability" . . . . .	38
Disability Income Protection . . . . .	12
Discussion . . . . .	34
Due from Other Funds . . . . .	85
Effective Date of Appointment, Staff	
See: "Appointment, Effective Date" . . . . .	8
Emergency Contact (Staff) . . . . .	10

Emergency Contact (Students) .....	29
Employee, Contract Term .....	10
Employee, New .....	10
Employee, Old .....	10
Employee Salary	
See: "Salary" .....	18
Employment, Major Field .....	10
Employment, Previous .....	10
See also: "Previous Employment Type" .....	17
Employment, Student	
See: "Student Employment" .....	41
End-of-Year Balance .....	85
Endowment Funds .....	85
See also: "Assets" .....	80
"Fund Balance Accounts" .....	87
"Fund Groups" .....	88
Endowment Income .....	85
Engaged in Research .....	10
Enrollment .....	30
Entrance Test Score(s) .....	30
Equal Employment Opportunity	
See: "Occupation" .....	36
Equipment .....	85
Establishment Date	
See: "Date Institution was Established" .....	2
Estimated Replacement Cost .....	56
Ethnic Categories	
See: "Civil Rights Racial/Ethnic Categories" .....	24
Evening College .....	2
Exhibition Facilities .....	57
Exhibition Service Facilities .....	57
Expenditure Control .....	86
Expenditures .....	86
Expenditures for Plant Assets .....	86
Expenditures, Object Classification	
See: "Object Classification Expenditures" .....	93
Expenditures, Total	
See: "Total Expenditures" .....	99
Experience, Number of Years .....	11
Expiration Date of Appointment, Staff	
See: "Appointment, Expiration Date" .....	8
Extension and Public Services Staff .....	11
Extension and Public Services .....	2
Extension Students .....	30
Facilities .....	57
Facilities Development Program .....	102

Facilities Inventory .....	103
Facilities Inventory and Classification	
Manual .....	103
Facilities Planning .....	103
Faculty .....	11
Faculty Activity Analysis .....	103
Faculty Contact Hours .....	11
Faculty Positions	
See: "Instructional Staff Position" .....	14
Faculty Salaries .....	93
See also: "Salary" .....	18
Faculty—Total .....	11
Fall Enrollment	
See: "Opening Fall Enrollment" .....	37
Fall Headcount	
See: "Opening Fall Enrollment" .....	37
Family Income	
See: "Student Family Income" .....	41
Family Relationship to Institution .....	30
Federal Old Age Survivors and Disability	
Insurance (FICA) .....	12
Fee Residency Status .....	31
Fees	
See: "Tuition and Fees" .....	43, 99
Fellowship .....	40
FICE Code .....	3
Field Building .....	57
Field of Employment	
See: "Employment, Major Field" .....	10
Finance Manual	
See: "Higher Education Finance Manual" .....	103
Financial Aid	
See: "Student Aid" .....	40
Financial Measures .....	103
See also: "Program Measures" .....	107
First—Professional	
See: "Student Level" .....	41
First Professional (First Time) .....	31
First-Time Student .....	31
See also: "Admission Status" .....	22
Food Facilities .....	57
Food Facilities Service .....	58
Food Stores	
See: "Central Food Stores" .....	50

Foreign Students	
See: "Citizenship or Residence Status"	9
"Civil Rights Racial/Ethnic Categories"	24
Freshman	
See: "Lower Division"	41
Fringe Benefits	11, 86
Full-Time Equivalent	31
Full-Time Equivalent Staff	13
Full-Time Instructional Staff	13
Full-Time Student	32
Function (Space)	
See: "Space Function"	72
Functional Classification – Current	
Funds Expenditures	87
Fund Balance	
See: "Net Change in Fund Balance"	93
Fund Balance Accounts	87
Fund Balance Allocated	88
Fund Balance—Gifts	88
Fund Balance Unallocated	88
Fund Groups	88
Fund Restrictions	89
General Planning Criteria	103
Gifts and Grants, Private	
See: "Private Gifts and Grants"	95
Government Appropriations	90
Government Grants and Contracts	90
Graduate First-Time	31
Grade Point Average	32
Grade Point Average, Cumulative	33
Grade Point Average, Current	33
Grade Point Average, Previous College	33
Graduate	42
Graduate Assistant (Teaching)	13
Graduating Student, Future Plans	33
Grantor Agencies	90
Gross Area	58
Greenhouse Facilities	58
Greenhouse Service Facilities	58
Group Life Insurance	12, 86
Guaranteed Disability Income Protection Plan	86
Guardian, Home of	
See: "Name of Parent, Guardian, or Spouse"	36
Head-Count Faculty	13



Head-Count Student .....	33
Health Care Service Facilities .....	58
Health Facility Service Space (Student) .....	59
Health Facility (Student) .....	59
HEGIS	
See: "Higher Education General Information Survey" .....	104
HEGIS Subject Field .....	33
High School, Class Size .....	33
High School, Date of Graduation .....	33
High School, Graduating .....	33
High School, Rank .....	34
High School, GPA .....	34
Higher Education Finance Manual .....	103
Higher Education General Information Survey .....	104
Highest Academic Degree or Diploma .....	13
Highest Degree	
See: "Highest Academic Degree or Diploma" .....	13
Highest Level of Offering .....	3
Hospitalization, Surgical and Medical Plans .....	86
House (Facilities) .....	59
Housing	
See: "Student Housing" .....	41
Housing Allowances or Housing .....	12
Housing Plan .....	87
Identification Number (I.D.) .....	14, 34
Imputed Average Section Size .....	59
Imputed Room Utilization Rate .....	59
Imputed Station Occupancy Ratio .....	59
Imputed Station Utilization Rate .....	60
Imputed Weekly Room House Capacity .....	60
Imputed Weekly Student Hours .....	61
Imputed Weekly Student House Capacity .....	60
In Kind with Cash Option .....	87
Inactive Area .....	61
Income .....	90
Income, Deferred .....	91
Independent Operations Program .....	104
Independent Study .....	34
Indirect Costs .....	91
Individual Study Laboratory .....	61
Individual Study Laboratory Service .....	61
Induced Course-Load Matrix .....	104
Information Exchange Procedures .....	104
In-State Student .....	31
Institutional Benefactor .....	91

Institutional Support Program .....	104
Instruction Program .....	104
Instruction Type .....	34
Instructional Activities .....	14
Instructional Staff .....	14
Instructional Staff, Full-Time	
See: "Full-Time Instructional Staff" .....	13
Instructional Staff, Part-Time	
See: "Part-Time Instructional Staff" .....	17
Instructional Staff Position .....	14
Instructional Staffing Policy .....	15
Insurance .....	91
Intercollegiate Athletics .....	104
Interfund Account .....	91
Interschool Account .....	91
Intra-Institutional Planning and Management .....	105
Intramural Athletics .....	105
Inventories .....	92
Investment Income .....	92
Investments .....	92
Junior	
See: "Upper Division" .....	42
Junior Staff	
See: "Staff Junior" .....	19
Laboratory .....	34
See also: "Class Laboratory" .....	50
"Individual Study Laboratory" .....	61
"Non-Class Laboratory" .....	65
"Service Laboratory" .....	70
"Special Class Laboratory" .....	72
Laboratory Type .....	61
Land and Improvements .....	92
Landscaping	
See: "Office Landscaping" .....	105
Laundry	
See: "Central Laundry" .....	50
Lecture .....	34
Lecture Series .....	35
Length of Appointment, Staff	
See: "Appointment Length" .....	8
Length of Serving Period .....	105
Level of Course	
See: "Course Level" .....	26
Level of Offering	
See: "Highest Level of Offering" .....	3

Level of Program	
See: "Highest Level of Offering" .....	3
Level of Student	
See: "Student Level" .....	41
Liabilities .....	82
Liability .....	85, 92
Library Processing Facility .....	62
Library Processing Room Facilities	
See: "Processing Room" .....	68
Licenses, Certificates, and Registrations .....	15
Life Income Funds	
See: "Annuity and Life Income" .....	88
Loan Cancellation and Write-Offs .....	92
Loan: Fund(s) .....	93
See also: "Assets" .....	80
"Fund Groups" .....	88
Loan, Student .....	40
Local Address, Staff	
See: "Address, Present (Local)" .....	7
Locker Room Facilities .....	62
Losses	
See: "Net Realized Losses on Investments" .....	93
Lounge Facilities .....	62
Lounge Service Facilities .....	62
Lower Division .....	41
Major .....	35
Major Degree Field .....	35
See also: "Academic Disciplines" .....	21
Major Field	
See: "Academic Disciplines" .....	21
Major Service Program(s) .....	4
Manpower Accounting Manual .....	105
Manpower Accounting Structure .....	105
Manpower Assignment Classification .....	105
Marital Status .....	15, 35
Matriculation Date .....	35
Mechanical Area .....	64
Medical and Hospital Insurance .....	12
Medium of Instruction .....	35
Meeting Room .....	62
Meeting Room Service .....	63
Merchandising Facilities .....	63
Merchandising Facilities Service .....	63
Method of Registration	
See: "Registration Method" .....	38
Mexican-American .....	24
Military Status .....	16, 36

Multiple-Family Dwelling Facility	63
Name (Staff)	16
Name (Student)	36
Name of Institution	4
Name of Parent, Guardian, or Spouse	36
Net Assignable Square Feet	
See: "Assignable Square Feet"	47
Net Change in Fund Balance	93
Net Realized Losses on Investments	93
New Employee	
See: "Employee, New"	10
New Position Occupant	
See: "Instructional Staff Position"	14
Non-Academic Professionals	16
Non-Assignable Area	63
Non-Class Laboratory	65
Non-Class Laboratory Service	65
Non-Degree Credit Student	
See: "Student, Non-Degree Credit"	43
Non-Faculty Salaries	93
Non-Graduating Student, Future Plans	36
Non-Instructional Activities	16
Non-Professional Staff	16
Non-Public	
See: "Control or Affiliation"	2
Notes Payable	93
Notes Receivable	93
Number Applied	
See: "Applied, Number"	23
Nurse Station	65
Object Classification--Expenditures	93
Occupancy Rate	65
Occupation	36
Occupational Activity Category	105
Occupational Activity Categories	16
Office Facilities	65
Office Landscaping	105
Office Related Conference Room	
See: "Conference Room (Office Related)"	54
Office Service Facilities	66
Old Employee	
See: "Employee, Old"	10
On-Campus Residence	
See: "Address, Present"	21
One-Family Dwelling Facility	66
Open Stack	66
Open Stack Reading Room	66

Opening Fall Enrollment .....	37
Operating Days .....	66
Organizational Unit .....	4, 94
Organized Activities Related to	
Educational Departments, Revenues .....	94
Other Expenditures .....	94
Other Facilities .....	66
Other Sources .....	94
Outcome Measures .....	108
Outcomes Project .....	106
Out-of-State Student .....	31
Ownership (Buildings) .....	67
Para-Professional Staff .....	17
Parent, Name of	
See: "Name of Parent, Guardian or Spouse" .....	36
Part-Time Instructional Staff .....	17
Part-Time Student .....	37
Patient Bath Facilities .....	67
Patient Bed - Day Capacity .....	67
Patient Bedroom Facilities .....	67
Payments on Annuity and Life Income .....	94
Permanent Address, Staff	
See: "Address, Permanent" .....	7
Permanent Address, Students	
See: "Address, Permanent" .....	21
Personnel .....	106
Personnel Inventory .....	17
Petty Cash .....	94
Physical Disability .....	38
Physical Education Classes .....	106
Physical Education Facilities	
See: "Athletic/Physical Education" .....	47
Physical Plant Facility .....	68
Planning Criteria	
See: "General Planning Criteria" .....	103
Plant Assets, Expenditures for	
See: "Expenditures for Plant Assets" .....	86
Plant Funds .....	89
Plant Funds for Investment in Plant .....	95
Plant Funds for Renewals and Replacements .....	95
See also: "Assets" .....	80
"Fund Balance Accounts" .....	87
Plant Funds for Retirement or Indebtedness .....	95
Plant Funds—Unexpended .....	95
See also: "Assets" .....	80
"Fund Balance Accounts" .....	87

Positions	
See: "Instructional Staff Positions" . . . . .	14
Post-Baccalaureate . . . . .	42
Post-Baccalaureate, First-Time . . . . .	23
Post-Doctoral . . . . .	43
Pre-Accreditation Status . . . . .	4
See also: "Accreditation" . . . . .	1
Predominant Calendar System . . . . .	5
Prepaid Expenses and Deferred Charges . . . . .	95
Present Address (Local), Staff	
See: "Address, Present (Local)" . . . . .	7
Present Address (Local), Students	
See: "Address, Present (Local)" . . . . .	21
Previous Employment, Type . . . . .	17
See also: "Employment, Previous" . . . . .	10
Primary Cost Centers . . . . .	83
Primary Programs . . . . .	106
Privacy	
See: "Degree of Privacy" . . . . .	55
Private Control or Affiliation . . . . .	2
Private Gifts and Grants . . . . .	95
Processing Room Facilities (Library) . . . . .	68
Professional Accreditation . . . . .	1
Professional Affiliations . . . . .	17
Professional Staff . . . . .	17
Program . . . . .	5, 106
Program Analysis . . . . .	106
Program Budgeting . . . . .	106
Program Category . . . . .	107
Program Classification Structure (PCS) . . . . .	107
Program Data . . . . .	107
Program Definition . . . . .	107
Program Element . . . . .	107
Program Function Categories (Staff) . . . . .	18
Program Measures . . . . .	107
Program Planning . . . . .	108
Program Structure . . . . .	109
Program Type	
See: "Type of Program" . . . . .	5
Programmed Instruction . . . . .	34
Provision for Endowment Income Stabilization . . . . .	95
Public Control or Affiliation . . . . .	2
Public Service	
See: "Extension and Public Services" . . . . .	2
"Major Service Programs" . . . . .	4
"Extension and Public Service Staff" . . . . .	11
"Public Service Programs" . . . . .	109

Public Service Program .....	109
Public Waiting Facilities .....	68
Publications .....	18
Quality Points .....	38
Quasi-Endowment Funds .....	96
Racial Categories	
See: "Civil Rights Racial/Ethnic Categories" .....	24
Radio Instruction .....	36
Radio, TV Facilities	
See: "Audio/Visual, Radio, TV" .....	48
Rank, Academic	
See: "Faculty" .....	11
Reading/Study Room .....	68
Readmit .....	23
Receivable	
See: "Accounts Receivable" .....	79
"Notes Receivable" .....	93
Recitation .....	34
Recognized Candidate Status .....	4
See also: "Accreditation" .....	1
Recreation Facilities .....	68
Recreation Service Facilities .....	69
Regional Accreditation .....	1
Registration Date .....	38
Registration Method .....	38
Registration, Students .....	38
Registration, Type .....	38
Religious Preference .....	39
Remodeling (of Buildings) .....	53
Replacement Cost	
See: "Estimated Replacement Cost" .....	56
Research	
See: "Engaged in Research" .....	10
"Departmental Research" .....	84
Research Facility .....	69
Research Faculty .....	109
Research, Separately Budgeted .....	96
Research, Sponsored .....	96
Reserve for Encumbrances .....	96
Residence Status	
See: "Citizenship or Residence Status" .....	9
Resident Instruction .....	18
Resident Instructional and Departmental	
Research Staff	
See: "Staff, Resident Instructional and Departmental" .....	19

Resident Research Staff	
See: "Staff, Resident Research"	19
Resident Student	39
Residential Status	
See: "Fee Residency Status"	31
Resigned Employee	15
Resource Measures	108
Restricted Funds	89
Restricted Gifts	96
Retirement	12, 87
Revenue Accounts, Current Funds	86
Revenue Control	97
Revenue, Deferred	97
Revenues, Current Fund	97
Room	69
Room and Board	39
Room Data	69
Room Types	69
Room Use Classification	
See: "Standard Room Use Classification"	73
Room Utilization	69
Room Utilization Rate	70
See also: "Average Room Utilization Rate"	48
"Imputed Room Utilization Rate"	59
Sabbatical Plan	87
Salary	18
See also: "Faculty Salaries"	93
Sales of Educational Departments	97
Satisfactory Condition (of Buildings)	53
Schedule of Courses	109
Scholarship	40
Seating Capacity	
See: "Designed Seating Capacity"	56
Section	39, 70
Section Size	70
See also: "Average Section Size"	48
"Imputed Average Section Size"	59
Seminar	34
Senior	
See: "Upper Division"	42
Senior Staff	
See: "Staff, Senior"	19
Service Areas	
See: "Appropriate Room Use Category in Section IV	
Service Department	97
Service Laboratory	70



Service Personnel .....	18
Service Programs	
See: Section I, "Major Service Programs" .....	4
Services	
See: "Supplies and Services" .....	99
Services and Supplies	
See: "Supplies and Services" .....	99
Sex .....	19, 39
Sex of Student Body .....	5
Shop Facilities .....	70
Shop Service Facilities .....	70
Short Course .....	35
Site Planning .....	109
Sleep/Study Facilities with Toilet/Bath .....	71
Sleep/Study Facilities without Toilet/Bath .....	71
Sleep/Study Service Facilities .....	71
Social Security Number .....	19, 39
Sophomore	
See: "Lower Division" .....	41
Source of Funds .....	97
Space Availability .....	71
Space Function .....	72
Space Management .....	109
Special Class Laboratory .....	72
Special Class Laboratory Service .....	72
Special Student .....	22
Spectator Seating	
See: "Athletic Facilities Spectator Seating" .....	47
Sponsored Research	
See: "Reserach, Sponsored" .....	96
Spouse, Name of	
See: "Name of Parent, Guardian, or Spouse" .....	36
Stack .....	72
Staff .....	109
Staff in Academic Departments .....	19
Staff, Instructional	
See: "Instructional Staff" .....	14
Staff, Junior .....	19
Staff, Non-Professional	
See: "Non-Professional Staff" ..	16
Staff, Para-Professional	
See: "Para-Professional Staff" ..	17
Staff, Professional	
See: "Professional Staff" .....	17

Staff, Resident Instructional and	
Departmental	19
Staff, Resident Research	19
Staff, Senior	19
Staffing Policy, Instructional	
See: "Instructional Staffing Policy"	15
Standard Room Use Classification	73
Station	73
Station Count	73
Station Occupancy Ratio	73
See also: "Average Station Occupancy Ratio"	48
"Imputed Station Occupancy Ratio"	59
Station Utilization Rate	73
See also: "Average Station Utilization	
Rate"	49
"Imputed Station Utilization	
Rate"	60
Stipends	94
Storage Facilities	74
Storage Service Facilities	74
Structural Area	64
Structural Area	
See: "Nonassignable Area"	63
Student Aid	40, 98
Student Attendance Status	
See: "Attendance Status"	23
Student Credit Hours of "Other" Instruction	40
Student Credit Hours (SCH)	41
Student Employment	41
Student Family Income	41
Student Fees	99
See also: "Tuition and Fees"	43, 99
Student Health Facilities	
See: "Health Facility (Student)"	59
Student Hour, Weekly	
See: "Weekly Student Hour"	44
Student Housing	41
Student Level	41
Student Loan (Current)	43
Student Major	43
Student Name	
See: "Name (Student)"	36
Student, Non-Degree Credit	43
Student, Part-Time	
See: "Part-Time Student"	37
Student Station Period Occupied	
See: "Station Occupancy Ratio"	73

Student Tuition and Fees	
See: "Tuition and Fees"	43,99
Study Facility	
See: "Reading/Study"	68
Study Room	
See: "Reading/Study Room"	68
Study Service (Facilities)	74
Summer Session	5
Supplies (Facilities)	74
Supplies and Services	93, 99
Support Cost	
See: "Cost Types"	83
Support Cost Center	
See: "Cost Centers"	83
Support Staff	110
Surgery Facilities	75
Target and Beneficiary Group Measures	108
Target Group	99
Teacher Contact Hours	
See: "Faculty Contact Hours"	11
Teaching Assignment(s)	
See: "Course Assignment(s)"	9
Teaching Assistant or Associate	
See: "Graduate Assistant (Teaching)"	13
Teaching Load	20
Teaching Staff	
See: "Instructional Staff"	14
Tenure Status	20
Term Endowment Funds	99
Termination (of Buildings)	54
Titles, Administrative	
See: "Administrative Titles"	7
Title of Appointment	
See: "Appointment Title"	8
Toilet/Bath Facilities	75
Total Expenditures	99
Transfer Student	43
See also: "Admission Status"	22
Transfers	99
Treatment, Facilities	75
Tuition and Fees	43, 99
Tuition for Employee Children	12
Tuition Plan	87
Turnover (Facilities)	75
TV Instruction	35
Type of Appointment	
See: "Appointment, Type"	8

Type of Instruction	
See: "Instruction, Type" . . . . .	34
Type of Occupant . . . . .	75
Type of Program . . . . .	5
Type of Registration	
See: "Registration, Type" . . . . .	38
Type of Student . . . . .	44
U.S. Citizen . . . . .	9
Unassigned Area	
See: "Inactive Area" . . . . .	61
Unclassified Facilities . . . . .	76
Unclassified Students	
See: "Student Level" . . . . .	41
Undergraduate First-Time . . . . .	31
Unemployment Compensation . . . . .	12, 87
Unfinished Area . . . . .	76
Unit Floor Area . . . . .	76
Unit Floor Area Criteria . . . . .	76
Unrestricted Funds	
See: "Fund Restrictions" . . . . .	89
Upper Division	
See: "Student Level" . . . . .	41
Utilization Assumptions Required . . . . .	76
Utilization Criteria . . . . .	76
Vacant Position . . . . .	15
Vehicle Storage Facility . . . . .	76
Vehicle Storage Facility Service . . . . .	76
Veterinary Facilities . . . . .	77
Volume . . . . .	110
Waiting Room	
See: "Public Waiting" . . . . .	68
Weekly Contact Hours . . . . .	44
Weekly Faculty Contact Hours . . . . .	20
Weekly Room Hours . . . . .	77
See also: "Imputed Weekly Room Hours" . . . . .	60
Weekly Room Hours Capacity . . . . .	77
See also: "Imputed Weekly Room Hours Capacity" . . . . .	60
Weekly Student Contact Hour	
See: "Weekly Student Hour" . . . . .	77
Weekly Student Hour . . . . .	77
See also: "Imputed Weekly Student Hours" . . . . .	61
Weekly Student Hour Capacity . . . . .	77
See also: "Imputed Weekly Student Hour Capacity" . . . . .	60
Weekly Student Hour of Classroom Instruction . . . . .	77
Weekly Student Hour of Laboratory Instruction . . . . .	77

Weekly User Hours .....	78
Workmen's Compensation .....	12
Workshop .....	35
Work-Study Program .....	40
Write-Offs	
See: "Loan Cancellation and Write-Offs" .....	92
Year of Construction .....	78