+XPDQ 5HVRXUFHV 2YHUYLHZ

:HOFRPH WR WKH ,3('6 +XPDQ 5HVRXUFHV +5 VXUYH\ FRPSRQHQW 7KH +5 FRPSRQHQ
DERXW \RXU LQVWLWXWLRQ V VWDII

'DWD 5HSRUWLQJ 5HPLQGHUV

5HSRUW HDFK HPSOR\HH RQO\ RQFH ,I DQ HPSOR\HH FRXOG EH FRGHG LQ PRUH
FRGH WKH HPSOR\HH LQ WKH RFFXSDWLRQ WKDW UHTXLUHV WKH KLJKHVW OHYH
PHDVXUDEOH GLIIHUHQFH LQ VNLOO UHTXLUHPHQWV FRGH WKH HPSOR\HH LQ WK
VSHQG WKH PRVW WLPH

5HSRUW VWDII PHPEHUV GLIILFXOW WR FDWHJRUL]H LQ WKH +XPDQ 5HVRXUFHV
DW WKH HQG RI WKH VXUYH\

(QWHU GDWD RQ HDFK GLVSOD\HG VFUHHQ ,I D VFUHHQ LV QRW DSSOLFDEOH H
ILHOG RQ WKH VFUHHQ DQG VDYH EHIRUH FRQWLQXLQJ

:KHQ UHSRUWLQJ VDODU\ GDWD DSSOLFDEOH WR GHJUHH JUDQWLQJ LQVWLWXW
WLPH QRQ PHGLFDO VFKRRO LQVWUXFWLRQDO VWDII ERWK ZLWK DQG ZLWKRX

6HH WKH LQVWUXFWLRQV IRU WKH .H\ 5HSRUWLQJ &RQFHSWV VHFWLRQ EDVLF UHSR
FRPSOHWLQJ WKH +XPDQ 5HVRXUFHV VXUYH\ FRPSRQHQW

7R GRZQORDG WKH VXUYH\ PDWHULDOV IRU WKLV FRPSRQHQW 6XUYH\ 0DWHULD
7R DFFHVV \RXU SULRU \HDU GDWD VXEPLVVLRQ IRU WKLV FRPSRQHQW 5HSRUW
$OO VWDII PXVW QRZ EH UHSRUWHG XVLQJ WKH QHZ ,3('6 RFFXSDWLRQDO FDWHJ
6WDQGDUG 2FFXSDWLRQDO &ODVVLILFDWLRQ 62& FRGHV $GGLWLRQDO LQIRUPD
,3('6 +5 62& ,QIRUPDWLRQ &HQWHU LQFOXGLQJ JHQHUDO LQIRUPDWLRQ DERXW
FURVVZDON D 62& %URZVH 7RRO IUHTXHQWO\ DVNHG TXHVWLRQV DQG ZHE WX

+XPDQ 5HVRXUFHV 6FUHHQLQJ 4XHVWLRQV

'RHV \RXU LQVWLWXWLRQ KDYH D WHQXUH V\VWHP"

*If you answer **Yes** to this question, you will be provided the screens to report some data by tenure status.*

◉ <HV ○ 1R

'RHV \RXU LQVWLWXWLRQ KDYH JUDGXDWH DVVLVWDQWV"

*If you answer **Yes** to this question, you will be provided the screens to report graduate assistants.*

◉ <HV ○ 1R

ZHUH LQFOXGHG
E WKH LQVWLWXW
$1' RYHPEHU "
UHW

to this question, you will be provided the screens to report graduate assistants.

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ $FDGHPLF 5DQN DQG 7HQXUH

1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII
:LWK)DFXOW\ 6WDWXV
7HQXUHG

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR
5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\
,QFOXGH ERWK 3ULPDULO\ ,QVWUXFWLRQ DQG ,QVWUXFWLRQ &RPELQHG ZLWK 5HVHDUFK DQG

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH
8VHU ,' 3

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ $FDGHPLF 5DQN DQG 7HQXUH
7HQXUH 7UDFN

1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII
:LWK)DFXOW\ 6WDWXV
2Q 7HQXUH 7UDFN

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR
5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\
,QFOXGH ERWK 3ULPDULO\ ,QVWUXFWLRQ DQG ,QVWUXFWLRQ &RPELQHG ZLWK 5HVHDUFK DQG

0HQ
5DFH HWKQLFLW\

UDQN 7RWDO
XHFWRUV
XHFWRUV
1 HVLGHQW DOLHQ

H
RU P

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ $FDGHPLF 5DQN DQG 7HQXUH
<HDU &RQWUDFW

1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII
:LWK)DFXOW\ 6WDWXV
1RW RQ 7HQXUH 7UDFN 0XOWL <HDU RU &RQWLQXLQJ RU $W ZLOO &RQ

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR
5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\
,QFOXGH ERWK 3ULPDULO\ ,QVWUXFWLRQ DQG ,QVWUXFWLRQ &RPELQHG ZLWK 5HVHDUFK DQG

0HQ

*HQGHU DQG UDFH HWKQL

$FDGHPLF 5DQN

$VVRFLDWH $VVLVWDQW
3URIHVVRU 3URIHVVRUV

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ $FDGHPLF 5DQN DQG 7HQXUH &RQWUDFW

1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII :LWK)DFXOW\ 6WDWXV 1RW RQ 7HQXUH 7UDFN $QQXDO &RQWUDFW

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ $FDGHPLF 5DQN DQG 7HQXUH
7KDQ $QQXDO &RQWUDFW

1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII
:LWK)DFXOW\ 6WDWXV
1RW RQ 7HQXUH 7UDFN /HVV WKDQ DQQXDO &RQWUDFW

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR
5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\
,QFOXGH ERWK 3ULPDULO\ ,QVWUXFWLRQ DQG ,QVWUXFWLRQ &RPELQHG ZLWK 5HVHDUFK DQG

0HQ

5DFH HWKQLFLW\	$FDGHPLF 5DQN				1R DFDG LF UDQN	7RWDO
	$VVRFLDWH	$VVLVWDQW	SURIHVVRU	,QVWUXFWRUV		
3URIHVVRV						

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH
8VHU ,' 3

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ )XQFWLRQ

1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII

$V RI 1RYHPEHU

5HSRUW 3ULPDULO\ ,QVWUXFWLRQ DQG ,QVWUXFWLRQ &RPELQHG ZLWK 5HVHDUFK DQG RU 3XE
EHORZ

	:LWK)DFXOW\ VWDWXV					:LWKR)DFXO VWDW	7RWDO
	7HQX	2Q 7HQX 7UDF	1RW RQ 7HQXUH 7UDFN 0XOWL \HDU FRQWLQXLQJ ZLOO FRQWUDFW	$QQXDO FRQWUDFW	/HVV WKDQ DQQXD FRQWUDFW		
,QVWUXFWLRQDO VWDII							
7RWDO FDUULHG IRUZDUG IURP SUHYLRXV VFUHHQV							
3ULPDULO\ ,QVWUXFWLRQ							
([FOXVLYHO\ FUHGLW							
([FOXVLYHO\ QRW IRU FUHGLW &RPELQHG FUHGLW QRW IRU FUHGLW							
,QVWUXFWLRQ UHVHDUFK SXEOLF VHUYLFH VWDII							

3DUW $)XOO WLPH ,QVWUXFWLRQDO 6WDII 7RWDOV

7RWDO QXPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII

$V RI 1RYHPEHU

5DFH HWKQLFLW\	7RWDO PHQ	7RWDO ZRPHQ	7RWDO PHQ ZRPHQ
1RQUHVLGHQW DOLHQ			
+LVSDQLF /DWLQR			
$PHULFDQ ,QGLDQ RU $ODVND 1DWLYH			
$VLDQ			
%ODFN RU $IULFDQ $PHULFDQ			
1DWLYH +DZDLLDQ RU 2WKHU 3DFLILF ,VODQGHU			
:KLWH			
7ZR RU PRUH UDFHV			
5DFH DQG HWKQLFLW\ XQNQRZQ			
7RWDO			
7RWDO IURP SULRU \HDU			

3DUW %)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII E\ 2FFXSDWLRQDO &DWHJR

1XPEHU RI)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII
E\ 2FFXSDWLRQDO &DWHJRU\

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR
5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\

0HQ			
5DFH HWKQLFLW\	,QVWUXFWLRQDO 6WDII FDUULHG IRUZDUG IURP 3DUW $	5HVHDUFK 6WDII	3XEOLF 6HUYLFH VWDII
1RQUHVLGHQW DOLHQ			
+LVSDQLF /DWLQR			
$PHULFDQ ,QGLDQ RU $ODVND 1DWLYH			
$VLDQ			
%ODFN RU $IULFDQ $PHULFDQ			
1DWLYH +DZDLLDQ RU 2WKHU 3DFLILF ,VODQGHU			
:KLWH			
7ZR RU PRUH UDFHV			
5DFH DQG HWKQLFLW\ XQNQRZQ			
7RWDO PHQ			

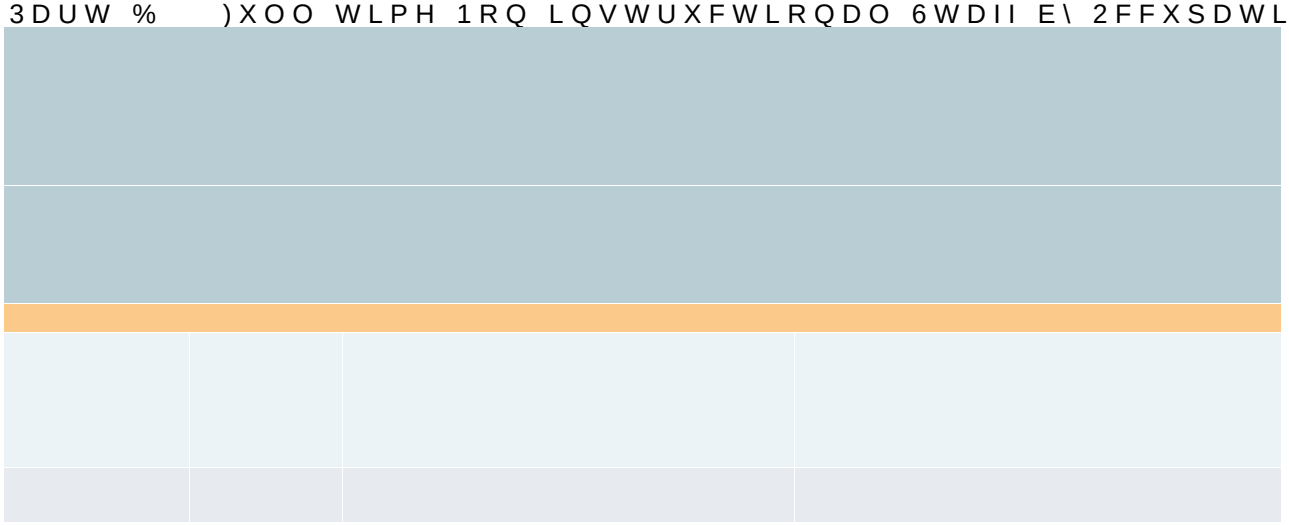
:RPHQ			
5DFH HWKQLFLW\	,QVWUXFWLRQDO 6WDII FDUULHG IRUZDUG IURP 3DUW $	5HVHDUFK 6WDII	3XEOLF 6HUYLFH VWDII
1RQUHVLGHQW DOLHQ			
+LVSDQLF /DWLQR			
$PHULFDQ ,QGLDQ RU $ODVND 1DWLYH			
$VLDQ			
%ODFN RU $IULFDQ $PHULFDQ			
1DWLYH +DZDLLDQ RU 2WKHU 3DFLILF ,VODQGHU			
:KLWH			
7ZR RU PRUH UDFHV			
5DFH DQG HWKQLFLW\ XQNQRZQ			
7RWDO ZRPHQ			

7RWDO PHQ ZRPHQ			
7RWDO IURP SUHYLRXV \HDU			

3DUW %)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII E\ 2FFXSDWLRQDO &DWHJR

1XPEHU RI)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII E\ 2FFXSDWLRQDO &DWHJRU\

3DUW %)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII E\ 2FFXSDWLRQDO &DWHJR



3DUW %)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII E\ 2FFXSDWLRQDO &DWHJRU

1XPEHU RI)XOO WLPH 1RQ LQVWUXFWLRQDO 6WDII

E\ 2FFXSDWLRQDO &DWHJRU\

$V RI 1RYHPEHU

5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR

5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\

0HQ

5DFH HWKQLFLW\	6HLFLWH 2FFXSDWLRQV	6DOHV DQG 5HODWHG 2FFXSDWLRQV	2IILFH DQG $GPLQLVWUDWLYH 6XSSRUW 2FFXSDWLRQV	1DWXUDO 5HVRXUFHV &RQVWUXFWLRQ 0DLQWHQDQFH 2FFXSDWLRQV	3URGXFWLRQ 7UDQVSRUWDWLRQ DQG 0DWHULDO 0RYLQJ 2FFXSDWLRQV	*RQDQG 7RWDOO $OOIXOO WLPH RQDII
1RQUHVLGHQW DOLHQ						
+LVSDQLF /DWLQR						
$PHULFDQ ,QGLDQ RU $ODVND 1DWLYH						
$VLDQ						
%ODFN RU $IULFDQ $PHULFDQ						
1DWLYH +DZDLLDQ RU 2WKHU 3DFLILF ,VODQGHU						

5DFH DQG HWKQLFLW\ XQNQRZQ					
7RWDO ZRPHQ					
7RWDO PHQ ZRPHQ					
7RWDO IURP SULRU \HDU					

3DUW &)XOO WLPH 6XPPDU\

6XPPDU\ RI)XOO WLPH 6WDII

$V RI 1RYHPEHU

[redacted] W VFUHHQV LQ WKH S

3DUW * 6DODULHV :RUNVKHHW

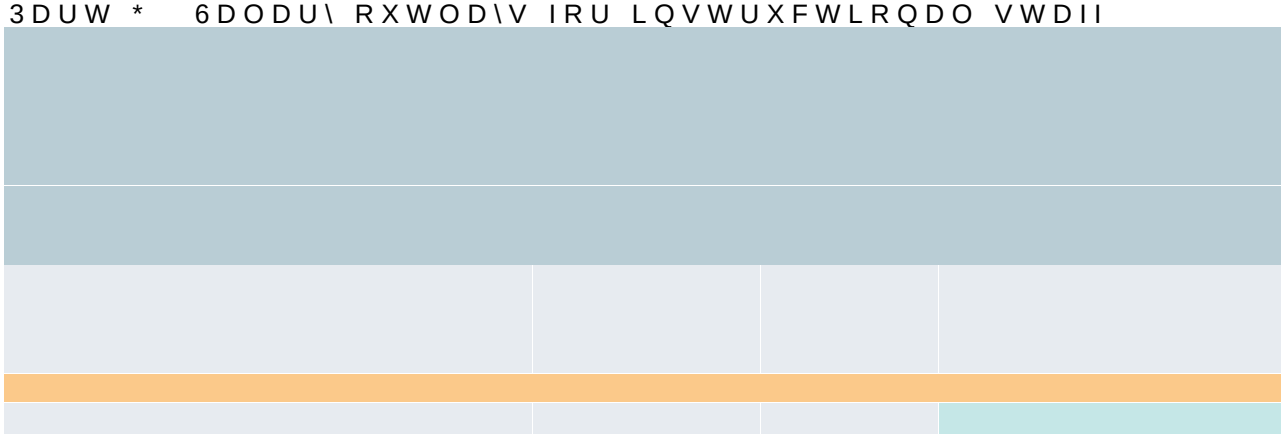
1XPEHU RI)XOO WLPH ,QVWUXFWLRQDO 6WDII
)RU &DOFXODWLRQ RI 7RWDO 1XPEHU RI 0RQWKV

$QQXDO 6DODU\

5HSRUW WKH QXPEHU RI LQVWUXFWLRQDO VWDII EDVHG RQ WKH QXPEHU RI PRQWKV WR EH Z
0RQWKV UHSRUWHG VKRXOG FRUUHVSRQG ZLWK WKH QXPEHU RI PRQWKV WKDW VWDII ZRUNHG
PRQWKV RYHU ZKLFK WKH\ DUH SDLG
,QFOXGH 21/< IXOO WLPH LQVWUXFWLRQDO VWDII
,QFOXGH LQVWUXFWLRQDO VWDII ***with*** IDFXOW\ VWDWXV DQG ***without*** IDFXOW\ VWDWXV
,QFOXGH LQVWUXFWLRQDO VWDII UHJDUGOHVV RI WHQXUH VWDWXV
%DODQFH FROXPQ VKRXOG LQFOXGH LQVWUXFWLRQDO VWDII ZKRVH DQQXDO VDODU\ FRYHUV

*HQGHU I DFDGHPL	0RQWKV ZRUNLQJ				7RWDO IRU 6DO UHSRUW	7RW 1XPEHU 0RQWK	7RWDO IX LQVWUXFW IURP 3DU	%DODQFH $OO RWKHU IXOO WLPH LQVWUXFWLRQDO VWDII
	PRQWKV	PRQWKV	PRQWKV	PRQWKV WKU				
0HQ								
3URIHVVRUV								
$VVRFLDWH SURIHVV								

3DUW * 6DODU\ RXWOD\V IRU LQVWUXFWLRQDO VWDII



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,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH
8VHU ,' 3

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH
8VHU ,' 3

3DUW ' 3DUW WLPH 6WDII E\ 2FFXSDWLRQDO &DWHJRU\

1XPEHU RI 3DUW WLPH 6WDII

$V RI 1RYHPEHU

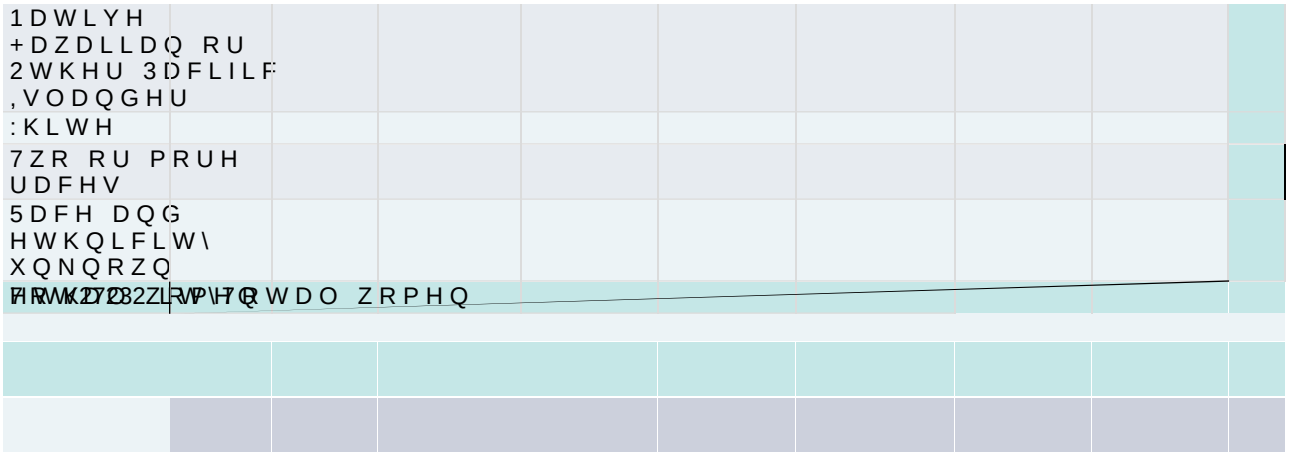
5HSRUW +LVSDQLF /DWLQR LQGLYLGXDOV RI DQ\ UDFH DV +LVSDQLF /DWLQR
5HSRUW UDFH IRU QRQ +LVSDQLF /DWLQR LQGLYLGXDOV RQO\

0HQ

5DFH HWKQLFLW\	6HUYLFH 2FFXSDWLRQV	6DOHV DQG 5HODWHG 2FFXSDWLRQV	2IILFH DQG $GPLQLVWUDWLYH 6XSSRUW 2FFXSDWLRQV	1DWXUDO 5HVRXUFHV &RQVWUXFWLRQ 0DLQWHQDQFH 2FFXSDWLRQV	3URGXFWLRQ 7UDQVSRUWDWLRQ DQG 0DWHULDO 0RYLQJ 2FFXSDWLRQV	*UDQG 7RWDO $OO SDUW WLPH VWDII
1RQUHVLGHQW DOLHQ						
+LVSDQLF /DWLQR						
$PHULFDQ ,QGLDQ RU $ODVND 1DWLYH						
$VLDQ						

7RWDO ZRPHQ					
7RWDO PHQ ZRPHQ					
7RWDO IURP SULRU \HDU					

3DUW ' *UDGXDWH DVVLVWDQWV


1DWLYH
+DZDLLDQ RU
2WKHU 3DFLILF
,VODQGHU
:KLWH
7ZR RU PRUH
UDFHV
5DFH DQG
HWKQLFLW\
XQNQRZQ

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH
8VHU ,' 3

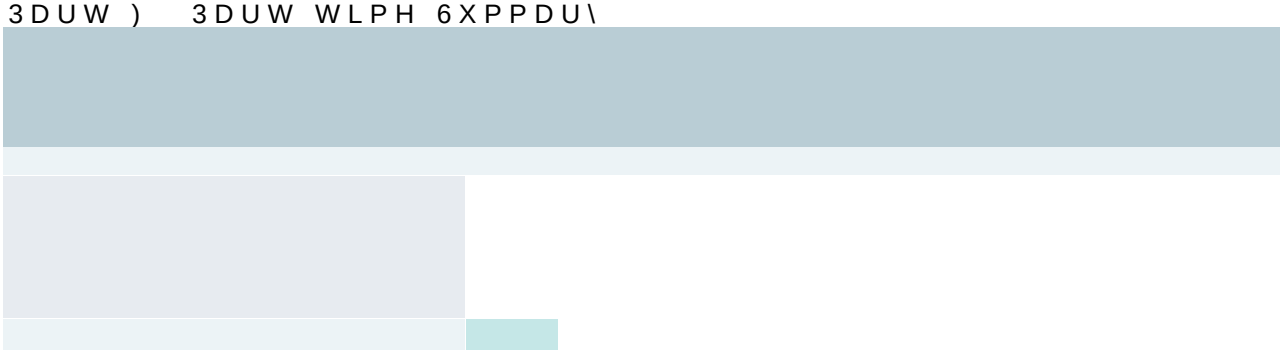
3DUW (3DUW WLPH 6WDII E\ 2FFXSDWLRQDO &DWHJRU\ DQG 7HQXUH 6WDWXV

1XPEHU RI 3DUW WLPH 6WDII

$V RI 1RYHPEHU

2FFXSDWLRQDO FDWHJRU\	:LWK)DFXOW\ VWDWXV					:LWK)DFX VWD	7RWDO
	7HQX	2Q 7HQX 7UD	1RW RQ 7HQXUH 7UDFN				
			0XOWL \HQU FRQWLQXLQJ DW ZLOO	$QQXDO FRQWUDFW	DVV WKDQ RQ FRQWUDFW	DQQ FW	
3ULPDULO\ ,QVWUXFWLRQ							
([FOXVLYHO\ FUHGLW							

3DUW) 3DUW WLPH 6XPPDU\



&RPSXWHU (QJLQHHULQJ DQG 6FLHQFH 2FFXSDWLRQV		
&RPPXQLW\ 6RFLDO 6HUYLFH /HJDO $UWV 'HVLJQ (QWHUWDLQPHQW 6SRUWV DQG 0HGLD 2FFXSDWLRQV		
/LEUDU\ DQG 6WXGHQW DQG $FDGHPLF $IIDLUV DQG 2WKHU (GXFDWLRQ 6HUYLFHV 2FFXSDWLRQV		
+HDOWKFDUH 3UDFWLWLRQHUV DQG 7HFKQLFDO 2FFXSDWLRQV		
7RWDO		

3DUW + 1HZ +LUHV)XOO WLPH ,QVWUXFWLRQDO 6WDII E\ 7HQXUH 6WDWXV

1XPEHU RI 1HZO\ +LUHG)XO O WLPH 3HUPDQHQW ,QVWUXFWLRQDO 6WDI

+LUHG IXOO WLPH EHWZHHQ -XO\ DQG 2FWREHU DQG
VWLOO RQ WKH SD\UROO RI WKH LQVWLWXWLRQ DV RI 1RYHPEHU

3DUW + 1HZ +LUHV)XOO WLPH 6WDII E\ 2FFXSDWLRQDO &DWHJRU\

1XPEHU RI 1HZO\ +LUHG)XOO WLPH 6WDII

5DFH DQG HWKQLFLW\ XQNQRZQ					
7RWDO ZRPHQ					
7RWDO PHQ ZRPHQ					

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH 8VHU ,' 3

+XPDQ 5HVRXUFHV 6XUYH\ (YDOXDWLRQ

:HUH DQ\ VWDII PHPEHUV GLIILFXOW WR FDWHJRUL]H" ,I VR SOHDVH H[SODLQ LQ WKH

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 0DQDWHH
8VHU ,' 3

3UHSDUHG E\

7KLV VXUYH\ FRPSRQHQW ZDV SUHSDUHG E\

,QVWLWXWLRQ 8QLYHUVLW\ RI 6RXWK)ORULGD 6DUDVRWD 3DQDWHH 6XPPDU\

+XPDQ 5HVRXUFHV &RPSRQHQW 6XPPDU\

,3('6 FROOHFWV LPSRUWDQW LQIRUPDWLRQ UHJDUGLQJ \RXU LQVWLWXWLRQ
VXUYH\ FRPSRQHQWV EHFRPH DYDLODEOH LQ WKH ,3('6 'DWD &HQWHU DQG DS
LQ YDULRXV 'HSDUWPHQW RI (GXFDWLRQ UHSRUWV $GGLWLRQDOO\ VRPH RI
VSHFLILFDOO\ IRU \RXU LQVWLWXWLRQ WKURXJK WKH &ROOHJH 1DYLJDWRU ZH
LQVWLWXWLRQ¶V 'DWD)HHGEDFN 5HSRUW ')5 7KH SXUSRVH RI WKLV VXPPDU
RSSRUWXQLW\ WR YLHZ VRPH RI WKH GDWD WKDW ZKHQ DFFHSWHG WKURXJK
SURFHVV ZLOO DSSHDU RQ WKH &ROOHJH 1DYLJDWRU ZHEVLWH DQG RU \RXU

+XPDQ 5HVRXUFHV