Forty Years of Fact Books: Lessons Learned

Denise Gardner
Marsha Allen

The University of Georgia
Topics for Discussion

- Conceptual and management issues related to the start-up or major redesign of your campus Fact Book
- Organizational issues
- Content considerations
- Format and design
- Print and web examples
Conceptual Issues

• What is the purpose of your Fact Book? Is this primarily an internal document or will it be used as a PR doc?
• How should your Fact Book relate to the institution’s mission, strategic goals, and assessment efforts?
• Who is your audience?
Conceptual Issues

- Are other fact sheets, websites already available? Who publishes these? Do you need to work collaboratively with others?
- If you are new on campus, is there a history to who publishes data, Fact Book-like info?
- Should you seek feedback from the IR Advisory Board, your boss, colleagues?
Management Issues

- Where do campus colleagues now go for data?
- Does your or another office have a data warehouse or similar database? If so, how should the Fact Book relate to it?
Management Issues

• What is the style and philosophy of senior administrators? How and what data do they currently use?
• What are management’s expectations?
Organizational Issues

- What is your budget for the project?
- How much effort will be needed – for startup, for yearly updates?
- IR staff: how many and who can you allocate to the project?
- What skills are needed?
  - Data collection, formatting and editing
  - Charts and graphs
  - Web publishing
Organizational Issues

• What software is needed to create and maintain the data? (InDesign, Excel, Word, mapping or other graphics programs, etc.)

• When should you publish?
  • User needs and expectations
  • IR workload – competing priorities and deadlines
Organizational Issues

- Work with your publications department / graphic communications area on deadlines and format
- Fact Book cover design
Fact Book Content

General Considerations

• Purpose and audience
• Most common data requests
• Data already accessible to users via websites or other documents
• Data sources – internal vs. external
• Time period represented – fiscal or academic year, fall term?
Fact Book Content

Institutional information

- Mission, goals, strategic plan
- Administration and organization
- Institution at a glance – “Fast Facts” or other institutional summary
Fact Book Content

Students

• Admissions – applicants, entering freshmen
• Enrollment – trends, headcounts by level, college/school, major
• Student progression – retention/graduation
• Degree programs offered, degrees conferred
• Student Affairs - organizations, housing, etc.
• Cost of attendance – tuition & fees, financial aid
• Unique features of your student body
Fact Book Content

Faculty

- Headcounts by rank, tenure status, race and gender
- Honors/awards, highest degrees
- Average faculty salaries

Staff

- Headcounts by employment status (full-time/part-time), EEO category, race and gender
Fact Book Content

Finance

- Institutional budget – sources of revenue
- Expenditures by function – instruction, research, public service
- Sponsored research – awards by type, funding source
- Endowments
- Alumni giving
Fact Book Content

Facilities

- Total number of buildings/square footage by location and major use
- Number of rooms by room type (classroom, lab, office)
- Space utilization
- Major construction projects
- Land holdings/acreage
Fact Book Content

Other topics to consider

- Academic data – grade distributions, credit hour production
- Library stats, rankings
- Alumni - counts by state or county, famous alums
- Athletics
- Peer comparisons
- Campus map
Formatting Issues

- Size - 8½ X 11, mini, other
- Orientation – portrait or landscape
- Spiral bound, hot glue binding
- Can include tabs for each section
- Color vs. black & white
- Graphs and charts
Formatting Issues

- Many institutions have several versions
  - Traditional printed book
  - Web: pdf and/or html
  - CD
  - Mini Fact Book/fold-out Fact Sheet

- Choice will depend on:
  - Purpose of the Fact Book
  - Campus expectations, history
  - Your budget
  - IR staff skills
  - Time you have to devote to the project
THE UNIVERSITY OF GEORGIA
ADMINISTRATIVE ORGANIZATION
OCTOBER 2009

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DEAN COLLEGE OF BUSINESS

DEAN COLLEGE OF FAMILY & CONSUMER SCI

DEAN GRADUATE SCHOOL

DEAN SCHOOL OF LAW

DEAN COLLEGE OF PUBLIC HEALTH

DEAN SCHOOL OF SOCIAL WORK

DEAN COLLEGE OF ARTS & SCIENCES

DEAN SCHOOL OF ECOLOGY

DEAN COLLEGE OF FORESTRY & NATURAL RES

DEAN COLLEGE OF JOURNALISM & MASS COMM

DEAN COLLEGE OF PHARMACY

DEAN COLLEGE OF PUBLIC & INTL AFFAIRS

DEAN COLLEGE OF VETERINARY MEDICINE

*Detailed organization charts available at www.uga.edu/lir
## Enrollment by Class

### Fall Terms 2000-2008

<table>
<thead>
<tr>
<th>Class</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
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<td>Freshmen (FR)*</td>
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<td>6,054</td>
<td>5,704</td>
<td>8,102</td>
<td>5,681</td>
<td>5,329</td>
<td>5,656</td>
<td>5,262</td>
<td>5,155</td>
<td>4,974</td>
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<td>Sophomore (SO)</td>
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<td>5,696</td>
<td>5,696</td>
<td>5,487</td>
<td>5,317</td>
<td>5,534</td>
<td>5,356</td>
<td>5,601</td>
<td>5,594</td>
<td>5,912</td>
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<tr>
<td>Junior (JR)</td>
<td>5,995</td>
<td>6,031</td>
<td>6,377</td>
<td>8,342</td>
<td>8,401</td>
<td>6,453</td>
<td>8,427</td>
<td>8,386</td>
<td>8,659</td>
<td>8,746</td>
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<td>Senior (SR)</td>
<td>8,283</td>
<td>8,639</td>
<td>8,611</td>
<td>7,089</td>
<td>7,238</td>
<td>7,498</td>
<td>7,833</td>
<td>7,714</td>
<td>7,755</td>
<td>8,258</td>
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<td>Unclassified (UC)**</td>
<td>405</td>
<td>405</td>
<td>405</td>
<td>382</td>
<td>382</td>
<td>380</td>
<td>383</td>
<td>340</td>
<td>304</td>
<td>252</td>
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<td>Total Undergraduate</td>
<td>24,213</td>
<td>24,829</td>
<td>24,983</td>
<td>25,415</td>
<td>25,019</td>
<td>25,204</td>
<td>25,437</td>
<td>25,335</td>
<td>25,467</td>
<td>26,142</td>
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<tr>
<td>Professional (PR)</td>
<td>1,388</td>
<td>1,513</td>
<td>1,498</td>
<td>1,541</td>
<td>1,594</td>
<td>1,621</td>
<td>1,654</td>
<td>1,546</td>
<td>1,553</td>
<td>1,607</td>
</tr>
<tr>
<td>Graduate (GR)</td>
<td>5,709</td>
<td>5,975</td>
<td>8,452</td>
<td>6,622</td>
<td>8,792</td>
<td>8,335</td>
<td>8,918</td>
<td>8,947</td>
<td>7,180</td>
<td>7,136</td>
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<tr>
<td>Total University***</td>
<td>31,285</td>
<td>32,317</td>
<td>32,041</td>
<td>33,878</td>
<td>33,405</td>
<td>33,660</td>
<td>33,959</td>
<td>33,839</td>
<td>34,180</td>
<td>34,685</td>
</tr>
</tbody>
</table>

* Includes joint enrolled and Developmental Studies students.
** Includes Transients, Independent and Distance Learning students and other non-degree undergraduates.
*** Fall Semester 2005 total enrollment includes 59 students displaced by Hurricane Katrina.

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**Figure 4**

Enrollment by Class

### Fall Terms 2000-2008

Source: Office of the Registrar
# Revenue by Source

**Fiscal Years 1998-00 Through 2008-09**

<table>
<thead>
<tr>
<th>Source</th>
<th>98-00</th>
<th>99-00</th>
<th>00-01</th>
<th>01-02</th>
<th>02-03</th>
<th>03-04</th>
<th>04-05</th>
<th>05-06</th>
<th>06-07</th>
<th>07-08</th>
<th>08-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>State of Georgia</td>
<td>43.5%</td>
<td>42.2%</td>
<td>41.3%</td>
<td>39.0%</td>
<td>34.7%</td>
<td>33.6%</td>
<td>33.5%</td>
<td>38.7%</td>
<td>39.0%</td>
<td>39.0%</td>
<td>36.4%</td>
</tr>
<tr>
<td>Counties of Georgia*</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
<td>1.4%</td>
</tr>
<tr>
<td>Federal Appropriations</td>
<td>1.1%</td>
<td>1.2%</td>
<td>1.2%</td>
<td>1.0%</td>
<td>0.9%</td>
<td>1.0%</td>
<td>0.9%</td>
<td>1.1%</td>
<td>1.3%</td>
<td>1.2%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Student Tuition and Fees</td>
<td>13.0%</td>
<td>13.4%</td>
<td>14.2%</td>
<td>15.5%</td>
<td>18.0%</td>
<td>18.5%</td>
<td>19.1%</td>
<td>22.1%</td>
<td>22.8%</td>
<td>23.8%</td>
<td>23.8%</td>
</tr>
<tr>
<td>Sales, Services and</td>
<td>4.3%</td>
<td>4.5%</td>
<td>4.7%</td>
<td>4.8%</td>
<td>4.8%</td>
<td>4.9%</td>
<td>5.3%</td>
<td>6.5%</td>
<td>6.8%</td>
<td>7.1%</td>
<td>7.1%</td>
</tr>
<tr>
<td>Miscellaneous</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
<tr>
<td>Gifts, Grants, Contracts</td>
<td>28.8%</td>
<td>29.5%</td>
<td>31.0%</td>
<td>33.2%</td>
<td>33.7%</td>
<td>32.4%</td>
<td>31.8%</td>
<td>20.3%</td>
<td>19.3%</td>
<td>20.1%</td>
<td>20.1%</td>
</tr>
<tr>
<td>Auxiliary Enterprises</td>
<td>7.8%</td>
<td>7.7%</td>
<td>7.5%</td>
<td>7.6%</td>
<td>7.6%</td>
<td>9.4%</td>
<td>9.3%</td>
<td>11.2%</td>
<td>10.9%</td>
<td>11.3%</td>
<td>11.3%</td>
</tr>
<tr>
<td>Endowment</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
<td>0.1%</td>
</tr>
</tbody>
</table>

* County vouchers no longer included as revenue effective fiscal year 2001-02.

Source: Senior Vice President for Finance and Administration

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**Figure 19**

**Distribution of Revenue by Source**

**Fiscal Year 2008-09**

- State of Georgia: 36.4%
- Student Tuition and Fees: 23.8%
- Gifts, Grants, Contracts: 20.1%
- Auxiliary Enterprises: 11.1%
- Sales, Services, Miscellaneous: 7.1%
- Federal Appropriations: 1.2%
- Endowment: 0.1%
- Gifts, Grants, Contracts: 0.1%
FACT BOOK ARCHIVE

click on the white text or image to select
Some good examples: Print

- **UGA**  [http://www.oir.uga.edu/factbks.htm](http://www.oir.uga.edu/factbks.htm)
- Mississippi State  
  [http://www.msstate.edu/dept/oir/factbook.htm](http://www.msstate.edu/dept/oir/factbook.htm)
- Jacksonville State  
- Texas System  
  [http://www.utsystem.edu/isp/factstrends.htm](http://www.utsystem.edu/isp/factstrends.htm)

- **Mini:** Southeastern Louisiana Univ., Georgia Tech
Some good examples:  Web

• Georgia Tech  
  http://www.irp.gatech.edu/apps/factbook/

• South Carolina  
  http://kudzu.ipr.sc.edu/factbook/

• Florida  http://www.ir.ufl.edu/facts.htm

• Nebraska  http://irp.unl.edu/factbooks

• Kennesaw State  
  http://vic33.kennesaw.edu/EIMWebApps/vic/fact_books/
### MSU FactBook Quick Glance

#### Enrollment Fall 1999 and Fall 2008

<table>
<thead>
<tr>
<th>Enrollment</th>
<th>Fall 1999</th>
<th>Fall 2008</th>
<th>Percent Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>White (Non-Hispanic)</td>
<td>12,178</td>
<td>12,851</td>
<td>5.5%</td>
</tr>
<tr>
<td>Black (Non-Hispanic)</td>
<td>2,722</td>
<td>3,622</td>
<td>33.1%</td>
</tr>
<tr>
<td>Other</td>
<td>1,147</td>
<td>1,351</td>
<td>17.8%</td>
</tr>
<tr>
<td>Male</td>
<td>8,701</td>
<td>9,126</td>
<td>4.9%</td>
</tr>
<tr>
<td>Female</td>
<td>7,346</td>
<td>8,698</td>
<td>18.4%</td>
</tr>
<tr>
<td>Resident</td>
<td>12,111</td>
<td>13,571</td>
<td>12.1%</td>
</tr>
<tr>
<td>Non-resident</td>
<td>3,936</td>
<td>4,253</td>
<td>8.1%</td>
</tr>
<tr>
<td>Undergraduate</td>
<td>12,861</td>
<td>13,991</td>
<td>8.8%</td>
</tr>
<tr>
<td>Graduate</td>
<td>3,186</td>
<td>3,833</td>
<td>20.3%</td>
</tr>
<tr>
<td>Total Headcount</td>
<td>16,047</td>
<td>17,824</td>
<td>11.1%</td>
</tr>
</tbody>
</table>

#### Enrollment Fall 1999 and Fall 2008

- **White (Non-Hispanic)**: Fall 1999 - 12,178, Fall 2008 - 12,851, Percent Change: 5.5%
- **Black (Non-Hispanic)**: Fall 1999 - 2,722, Fall 2008 - 3,622, Percent Change: 33.1%
- **Other**: Fall 1999 - 1,147, Fall 2008 - 1,351, Percent Change: 17.8%
- **Male**: Fall 1999 - 8,701, Fall 2008 - 9,126, Percent Change: 4.9%
- **Female**: Fall 1999 - 7,346, Fall 2008 - 8,698, Percent Change: 18.4%
- **Resident**: Fall 1999 - 12,111, Fall 2008 - 13,571, Percent Change: 12.1%
- **Non-resident**: Fall 1999 - 3,936, Fall 2008 - 4,253, Percent Change: 8.1%
- **Undergraduate**: Fall 1999 - 12,861, Fall 2008 - 13,991, Percent Change: 8.8%
- **Graduate**: Fall 1999 - 3,186, Fall 2008 - 3,833, Percent Change: 20.3%
- **Total Headcount**: Fall 1999 - 16,047, Fall 2008 - 17,824, Percent Change: 11.1%
DID YOU KNOW?
MSU has one of the largest cooperative education programs in the Southeast, with more than 500 students enrolled.
JSU Fact Book

The new Jacksonville State University Fact Book for 2009 - 2010 is now available for printing.

Note that each section can be downloaded individually, each table can be downloaded individually, and the entire Fact Book can be downloaded.

Publication Awards: 2008-09 2nd Place winner in the Southern Association of Institutional Research (SAIR) Best Publication category.

A Decade of Progress...

As the sun sets on the first decade of the presidency of Dr. William A. Meehan, we would like to celebrate the leadership of the 11th president of Jacksonville State University.

Embark with us on a decade-long journey reflecting on the accomplishments the JSU administration, faculty, staff and students have made under the leadership of Dr. Meehan.

As you will see by the strides and accomplishments of the university highlighted here, it has truly been a Decade of
The Office of Institutional Research and Planning (IRP) is responsible for the development and maintenance of data resources to support the Georgia Tech
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ADMISSIONS

Admissions, Fall 2009

<table>
<thead>
<tr>
<th>Type</th>
<th>Applied</th>
<th>Accepted</th>
<th>Enrolled</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman</td>
<td>11,432</td>
<td>6,721</td>
<td>2,660</td>
</tr>
<tr>
<td>Transfer</td>
<td>1,741</td>
<td>617</td>
<td>524</td>
</tr>
<tr>
<td>Graduate</td>
<td>11,774</td>
<td>3,907</td>
<td>2,012</td>
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</table>

Cumulative Average SAT for Entering Freshmen:

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<tr>
<th></th>
<th>Verbal</th>
<th></th>
<th>Math</th>
<th></th>
</tr>
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<tr>
<td></td>
<td>M</td>
<td>F</td>
<td>Total</td>
<td>M</td>
</tr>
<tr>
<td></td>
<td>652</td>
<td>663</td>
<td>656</td>
<td>721</td>
</tr>
</tbody>
</table>

FINANCIAL AID

Georgia Tech Awards Student Aid, FY 2008-2009

<table>
<thead>
<tr>
<th>Type</th>
<th>Number of Awards</th>
<th>Amount of Awards</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal Funds</td>
<td>12,755</td>
<td>$69,418,865</td>
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<tr>
<td>State Funds</td>
<td>6,296</td>
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</tr>
<tr>
<td>National Merit/Achievement</td>
<td>475</td>
<td>1,028,786</td>
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<tr>
<td>Institutional Scholarships/Loans</td>
<td>4,385</td>
<td>30,652,590</td>
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<tr>
<td>Total GT Awarded Aid</td>
<td>23,911</td>
<td>$132,380,245</td>
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<tr>
<td>Total Outside Awards</td>
<td>2,747</td>
<td>$15,556,765</td>
</tr>
<tr>
<td>Total Awards</td>
<td>26,658</td>
<td>$147,937,010</td>
</tr>
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</table>

COST OF ATTENDANCE

Tuition and Fees, FY 2010

<table>
<thead>
<tr>
<th>Type</th>
<th>Resident</th>
<th>Non-Resident</th>
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</thead>
<tbody>
<tr>
<td>Undergraduate</td>
<td>$7,606</td>
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<tr>
<td>Graduate</td>
<td>$8,420</td>
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</tr>
<tr>
<td>MBA Program</td>
<td>$10,474</td>
<td>$33,642</td>
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Breakdown of Other Mandatory Fees (included in above):

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<th>Type</th>
<th>Amount</th>
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<tr>
<td>Student Activities</td>
<td>$236</td>
</tr>
<tr>
<td>Student Athletic</td>
<td>$246</td>
</tr>
<tr>
<td>Student Health</td>
<td>$39</td>
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</table>