



Board of Trustees
UNIVERSITY of WEST FLORIDA

Full Board Meeting
Thursday, September 18, 2025
UWF Conference Center
9:00 a.m. CT

[Zoom Webinar](#) | Passcode: 059657

Agenda

- I. Call to Order**
- II. Roll Call**
- III. Greeting**
- IV. Public Comment**
- V. Approval of Minutes**
- VI. Reports**

- a. President's Report
- b. Faculty Report
- c. Student Report
- d. Program Report: Archaeology
- e. BOT Committee Reports
 - i. Academic Affairs Committee
 - ii. Audit and Compliance Committee
 - iii. Finance, Facilities, & Operations Committee
- f. Direct Support Organization Reports
 - i. UWF Business Enterprises, Inc.
 - ii. UWF Foundation, Inc.
 - iii. UWF Historic Trust, Inc.

VII. Unfinished Business

- a. Consent Agenda
 - i. ACA-1: Tenure as a Condition of Employment
 - ii. ACA-2: Academic Affairs Committee Charter Revision
 - iii. ACA-4: Institutes & Centers Annual Report
 - iv. ACA-5: Textbook & Instructional Materials Affordability Report
 - v. AUD-1: Internal Audit Report: Third Party Vendor Risk Management

- vi. AUD-2: Internal Audit Report: International Affairs Budget
- vii. AUD-3: Internal Audit Report: Foreign Travel and Screening
- viii. AUD-4: Office of Compliance and Ethics Annual Report
- ix. AUD-5: Office of Compliance and Ethics Work Plan
- x. FFO-1: Revisions to UWF Reg. 4.0031 Tuition and Fee Refunds
- xi. FFO-3: Revisions to UWF Reg. 5.020 Trespass Warning and Access to University Property
- xii. FFO-4: Revisions to UWF Reg. 5.030 Traffic Control
- xiii. FFO-5: New UWF Reg. 6.006, Procurement Services and Repeal UWF Regs. 6.005 – 6.0058

VIII. New Business

a. Action Items

- i. [BOT-1](#): Resolution 2025.7 in Recognition of Distinguished Service
- ii. [BOT-2](#): Final FY 24-25 University Carryforward & Fixed Capital Outlay
- iii. [BOT-3](#): FY 25-26 Carryforward, Fixed Capital Outlay, & Certification
- iv. [BOT-4](#): Annual Report of Self-Supporting & Market Tuition Rate Programs
- v. [BOT-5](#): Institutional Neutrality Statement
- vi. [BOT-6](#): Rescission of University Policies BOT-03 and BOT-04
- vii. [BOT-7](#): Approval to Seek New Institutional Accreditor
- viii. [BOT-8](#): Revisions to UWF Reg. 5.001 Parking and Registration
- ix. [BOT-9](#): Presidential Search: Position Criteria
- x. [BOT-10](#): Presidential Search: Compensation

b. Information Items

- i. [INFO-1](#): Presidential Search: Marketing Plan
- ii. [INFO-2](#): 2025 UWF Bonuses Report
- iii. [INFO-3](#): FY 2024/25 Final Operating Budget Summary Performance
- iv. [INFO-4](#): DSO Operating Budgets FY 2024/25 & DSO Resources Utilized

IX. Good of the Order

X. Adjournment

Mission: *UWF delivers a learner-focused university education that enables students from varied backgrounds to meet their career and life goals. UWF research and community partnerships advance the body of knowledge and enhance the prosperity of the region and the state.*



Board of Trustees
UNIVERSITY *of* WEST FLORIDA

Approval of Minutes

❖ August 14, 2025

❖ September 8, 2025

**Special Full Board Meeting
August 14, 2025
UWF Conference Center
DRAFT Minutes**

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Board Meeting

11:10 a.m.

The public was provided with information on the UWF Board of Trustees website to attend this public meeting in person in the UWF Conference Center or virtually through Zoom Webinar.

I. Call to Order

- A. The meeting of the UWF Board of Trustees was called to order at 11:10 a.m. by Chair Rebecca Matthews.

II. Roll Call

- A. Chair Matthews asked Anna Lochas to conduct roll call. Trustees Paul Bailey, Dick Baker, Trista Bennett, Adam Kissel, Rebecca Matthews, Heather Riddell, Ashley Ross, Alonzie Scott, Zack Smith, and Chris Young were in attendance in person. Trustees Edward Fleming, Paul Hsu, and Rachel Moya were in attendance virtually.

B. Others in attendance included:

1. Manny Diaz, Jr., Interim President; Jaromy Kuhl, Senior Vice President and Provost; Howard Reddy, Vice President of University Advancement; Betsy Bowers, Vice President of Finance and Administration; Mary Anderson, Interim Vice President and Dean of Students for Academic Engagement and Student Affairs; Clifford Humphrey, Chief of Staff and Vice President of Strategic Initiatives; Dave Scott, Associate Vice President for Athletics; Jamie Sprague, Chief Human Resource Officer; Julie Sheppard, Interim General Counsel; Anamarie Mixson, Assistant Vice President for the Office of the President; Abigail Megginson, Director, Government Relations; Alex Smith, Director of External Affairs; David Bryant, Chief Audit Executive; Matt Packard, Chief Compliance Officer; Dallas Snider, Vice Provost; Mohamed Khabou, Dean of Hal Marcus College of Science and Engineering; Allison Schwartz, Director of Undergraduate Research; Cass Boatwright, Director of Procurement and Contracts; and Anna Lochas, Board of Trustees Liaison.

III. Greeting

- A. Chair Matthews welcomed everyone to the meeting and noted that there were two action items and two information items on agenda.

IV. Public Comment

- A. Chair Matthews opened the floor for public comment. There was none.

V. President's Report

- A. Chair Matthews called on Interim President, Manny Diaz, Jr. to give the President's Report. Interim President Diaz gave an update on his activities for his first month in office.

VI. Approval of Minutes

- A. Chair Matthews reminded the trustees that they had been given the opportunity ahead of time to review the minutes of the June 12, 2025, Board of Trustees Meeting and the July 24, 2025, Special Board of Trustees Meeting. Chair Matthews asked for a motion to approve the minutes as presented, if there were no changes or corrections.
 1. Motion by: Trustee Smith
 2. Seconded by: Trustee Kissel
 3. Motion passed unanimously.

VII. New Business

- A. Action and Information Items

1. INFO-1: Summer Undergraduate Research Program (SURP)
 - a. Dr. Mohamed Khabou, Dean of the Hal Marcus College of Science and Engineering and Dr. Allison Schwartz, Director of the Office of Undergraduate Research, presented the first

information item on the Summer Undergraduate Research Program (SURP).

2. BOT-1: General Education Course Offerings

- a. Dr. Dallas Snider, Vice Provost, presented the first action item on the General Education Course Offerings list.
- b. Trustee Kissel made a motion to approve the list of general education course offerings effective Fall 2026 excluding the course AST 2037 Life in the Universe to be discussed separately.
 - i. Seconded by: Trustee Baker
 - ii. Motion passed unanimously.
- c. Trustee Kissel started the discussion on the course AST 2037 Life in the Universe. Trustee Young made a motion to remove AST 2037 Life in the Universe from the list of general education course offerings effective Fall 2026, noting that the course may still be offered as an elective.
 - i. Seconded by: Trustee Smith
 - i. Trustee Paul Bailey Aye
 - ii. Trustee Dick Baker Nay
 - iii. Trustee Trista Bennett Nay
 - iv. Trustee Edward Fleming Nay
 - v. Trustee Paul Hsu Nay
 - vi. Trustee Adam Kissel Aye
 - vii. Trustee Rebecca Matthews Aye
 - viii. Trustee Rachel Moya Aye
 - ix. Trustee Heather Riddell Nay
 - x. Trustee Ashley Ross Aye
 - xi. Trustee Alonzie Scott Nay
 - xii. Trustee Zack Smith Aye
 - xiii. Trustee Chris Young Aye
 - ii. Motion passed.

3. BOT-2: 2026-2027 Legislative Budget Request

- a. Dr. Jaromy Kuhl, Senior Vice President and Provost, presented the second action item on the 2026-2027 Legislative Budget Request.
- b. Chair Matthews asked for a motion to approve the proposed 2026-2027 Legislative Budget Request as presented.
 - i. Motion by: Trustee Riddell
 - ii. Seconded by: Trustee Ross
 - iii. Motion passed unanimously.

4. INFO-2: Institutional Neutrality Statement

- a. Dr. Kuhl presented the second information item on the Institutional Neutrality Statement.

VIII. Good of the Order

- A. Chair Matthews identified that all agenda items had been discussed. Chair Matthews asked if the board members had any additional business to discuss. No other business was discussed.

IX. Adjournment

12:30 p.m.

- A. Chair Matthews thanked those in attendance for their participation. With no other business to discuss, Chair Matthews adjourned the meeting at 12:30 p.m.

**Special Full Board Meeting
September 8, 2025
Zoom Webinar
DRAFT Minutes**

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Board Meeting

2:00 p.m.

The public was provided with information on the UWF Board of Trustees website to attend this public meeting virtually through Zoom Webinar.

I. Call to Order

- A. The meeting of the UWF Board of Trustees was called to order at 2:00 p.m. by Chair Rebecca Matthews.

II. Roll Call

- A. Chair Matthews asked Anna Lochas to conduct roll call. Trustees Paul Bailey, Dick Baker, Paul Hsu, Adam Kissel, Rebecca Matthews, Rachel Moya, Heather Riddell, Ashley Ross, Zack Smith, and Chris Young were in attendance in person. Trustees Trista Bennett, Edward Fleming, and Alonzie Scott were absent.
- B. Others in attendance included:
 - 1. Manny Diaz, Jr., Interim President; Jaromy Kuhl, Senior Vice President and Provost; Howard Reddy, Vice President of University Advancement; Betsy Bowers, Vice President of Finance and Administration; Mary Anderson, Interim Vice President and Dean of Students for Academic Engagement and Student Affairs; Clifford

Humphrey, Chief of Staff and Vice President of Strategic Initiatives; Dave Scott, Associate Vice President for Athletics; Jamie Sprague, Chief Human Resource Officer; Julie Sheppard, Interim General Counsel; Anamarie Mixson, Assistant Vice President for the Office of the President; Alex Smith, Director of External Affairs; Shelley Diviney, Interim Dean of the Usha Kundu, MD. College of Health; Brittany Sherwood, Chief Communications Officer; and Anna Lochas, Board of Trustees Liaison.

III. Greeting

- A. Chair Matthews welcomed everyone to the meeting and noted that there was one action item on agenda.

IV. Public Comment

- A. Chair Matthews opened the floor for public comment. There was none.

V. New Business

- A. Action Item

1. BOT-1: 2025-2026 Linking Industry to Nursing Education (LINE) Funding Proposals
 - a. Dr. Shelley Diviney, Interim Dean of the Usha Kundu, MD. College of Health, presented the action item on the 2025-2026 Linking Industry to Nursing Education (LINE) Funding Proposals.
 - b. Chair Matthews asked for a motion to Approve 2025-2026 LINE Fund Proposals for Ascension Sacred Heart, Baptist Health Care, and Santa Rosa Medical Center.
 - i. Motion by: Trustee Kissel
 - ii. Seconded by: Trustee Baker
 - iii. Motion passed unanimously.

VI. Good of the Order

- A. Chair Matthews identified that all agenda items had been discussed. Chair Matthews asked if the board members had any additional business to discuss. No other business was discussed.

VII. Adjournment

2:07 p.m.

- A. Chair Matthews thanked those in attendance for their participation. With no other business to discuss, Chair Matthews adjourned the meeting at 2:07 p.m.



Board of Trustees
UNIVERSITY *of* WEST FLORIDA

Reports

- ❖ **President's Report**
- ❖ **Faculty Report**
- ❖ **Student Report**
- ❖ **Program Report: Archaeology**
- ❖ **BOT Committee Reports**
- ❖ **Direct Support Organization Reports**

ARCHAEOLOGY

at the UNIVERSITY *of* WEST FLORIDA



Department of
Anthropology
UNIVERSITY *of* WEST FLORIDA



Archaeology Institute
UNIVERSITY *of* WEST FLORIDA



FLORIDA PUBLIC
ARCHAEOLOGY
NETWORK
A PROGRAM OF THE UNIVERSITY *of* WEST FLORIDA



ARCHAEOLOGY

at the UNIVERSITY of WEST FLORIDA



DEPARTMENT OF ANTHROPOLOGY

Ten faculty oversee undergraduate and graduate degree programs in Anthropology, Historical Archaeology, and Maritime Studies.



ARCHAEOLOGY INSTITUTE

Since the 1980s, the Institute has supported UWF's academic programs through field schools, archaeological services, research, preservation, and community outreach.



FLORIDA PUBLIC ARCHAEOLOGY NETWORK

Founded in 2005, this statewide network works to promote and facilitate stewardship, public appreciation, and value of Florida's archaeological heritage.

1559 LUNA SETTLEMENT SITE AND SHIPWRECKS



Archaeological remains in Pensacola of the 1559-1561 Spanish settlement by Tristán de Luna y Arellano represent the **oldest multi-year European settlement in the United States.**



UWF students and faculty have been investigating Luna history and archaeology since **the discovery of the first shipwreck in 1992.**

ARCHAEOLOGY

at the UNIVERSITY of WEST FLORIDA

LUNA COMMUNITY OUTREACH

The location of the 1559 Luna land settlement site in the **East Pensacola Heights neighborhood** has led to robust partnerships and collaborative community archaeology.

UWF has developed **focused outreach and education opportunities** for landowners, school-age children, and other members of the Northwest Florida community.

Upcoming, grant-funded partnership with UWF Historic Trust to develop **Luna National Register of Historic Places Historic District**.





“FINDING FORT KIRKLAND”



Media Features:
WEAR-TV 3; WUWF 88.1; Local Pulse Pensacola

2024/2025 project to identify **sites from Okaloosa County’s early 19th-century history.**

High-impact Advanced Metal Detection for Archaeologists (AMDA) **training and fieldwork for UWF students and local veterans.**

ARCHAEOLOGY

at the UNIVERSITY of WEST FLORIDA

MARITIME ARCHAEOLOGY

UWF has **one of only three graduate-level programs in U.S.** with multi-faculty focus on maritime archaeology.

Field schools span **submerged paleo-landscapes investigations to 16th-century Spanish shipwreck remains to 19th-century industrial sites** and shipwrecks.

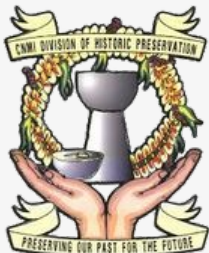
Faculty provide **high-impact research opportunities using cutting edge-technologies** to help students meet in-demand workforce standards.



DPAA/JOINT TASK FORCE: SAIPAN



Since 2018, FPAN has trained citizen science veterans to participate in **fallen service member recovery projects from WWII Battle of Saipan** aircraft wreckages.





HISTORIC CEMETERIES PRESERVATION



In 2013, **UWF researchers developed the Pensacola Area Cemetery Team (PACT)** to promote local historic cemetery preservation through an interdisciplinary approach to education and training and by fostering an informed stewardship base.

Over 100 local monuments and markers have been preserved through UWF efforts.

Pairing advanced technologies with simple recording **helps reconnect community members with family legacies.**





MIRAFLORES PARK, PENSACOLA



Media Features:

Associated Press; FOX-10; WEAR-TV 3; Pensacola News Journal;
WUWF 88.1



UWF faculty and students **assisted the City of Pensacola with identifying and reintering human remains** discovered in 2021.

Collaborative **public outreach and development of interpretive signs** has ensured active community engagement.

ARCHAEOLOGY

at the UNIVERSITY of WEST FLORIDA

MILTON HIGH SCHOOL ARCHAEOLOGY

Since 2008, **FPAN** and **UWF** graduate students have **co-taught the Milton High School** Anthropology and Archaeology class.

Students **develop a research plan, establish a grid, follow scientific archaeological procedures, map their excavations, and sort the artifacts** they uncovered from the Milton High School grounds.

The UWF/Milton High School partnership is a **unique, experiential opportunity in archaeology** for students in Florida public schools.



COMMUNITY ENGAGEMENT



UWF archaeology faculty and students **partners with local businesses, civic organizations, and community non-profits to bring heritage topics to broad audiences**, like the 2024 Northwest Florida Seafood Heritage series cooking event.



Volunteer opportunities to work in archaeological labs provide **thousands of hours of service** to UWF archaeology.



THANK YOU



There's more UWF archaeology to explore:



UWF Archaeology Institute Museum
Main Campus, Bldg 89



FPAN Destination Archaeology Resource Center
Historic Downtown Campus, 207 E Main Street



Pensacola Museum of History
Historic Downtown Campus, 330 S Jefferson Street



Department of
Anthropology
UNIVERSITY of WEST FLORIDA



Archaeology Institute
UNIVERSITY of WEST FLORIDA



FLORIDA PUBLIC
ARCHAEOLOGY
NETWORK
A PROGRAM OF THE UNIVERSITY of WEST FLORIDA



Board of Trustees
UNIVERSITY *of* WEST FLORIDA

Unfinished Business

❖ Consent Agenda

Consent Agenda

Consent Agenda Items:

1. ACA-1: Tenure as a Condition of Employment
2. ACA-2: Academic Affairs Committee Charter Revision
3. ACA-4: Institutes & Centers Annual Report
4. ACA-5: Textbook & Instructional Materials Affordability Report
5. AUD-1: Internal Audit Report: Third Party Vendor Risk Management
6. AUD-2: Internal Audit Report: International Affairs Budget
7. AUD-3: Internal Audit Report: Foreign Travel and Screening
8. AUD-4: Office of Compliance and Ethics Annual Report
9. AUD-5: Office of Compliance and Ethics Work Plan
10. FFO-1: Revisions to UWF Reg. 4.0031 Tuition and Fee Refunds
11. FFO-3: Revisions to UWF Reg. 5.020 Trespass Warning and Access to University Property
12. FFO-4: Revisions to UWF Reg. 5.030 Traffic Control
13. FFO-5: New UWF Reg. 6.006, Procurement Services and Repeal UWF Regs. 6.005 – 6.0058

Trustees may pull any individual item from the consent agenda for further review as needed. Each item was fully discussed during the committee meetings and all recommendations of the committees reflect the proposed action provided on the agenda.

** ACA-3: General Education Course Offerings was approved by the full Board of Trustees at their Special Full Board Meeting on Thursday, August 14, 2025.*

*** FFO-2: Revisions to UWF Reg. 5.001 Parking and Registration was pulled from the Consent Agenda as additional revisions were needed. This will be presented to the full Board of Trustees at their Full Board Meeting on Thursday, September 18, 2025.*



Board of Trustees
UNIVERSITY *of* WEST FLORIDA

New Business

❖ Action Items

❖ Information Items

**Board of Trustees
Full Board Meeting
September 18, 2025**

Resolution 2025.7 in Recognition of Distinguished Service

Recommended Action:

Adopt Resolution 2025.7 in Recognition of Distinguished Service to the University of West Florida by Trustee Susan James.

Background Information:

The UWF Board of Trustees recognizes the contributions Trustee Susan James has made to the University and this resolution serves as a token of the board's sincerest thanks.

Susan James was elected as President of the UWF Faculty Senate for a two-year term beginning in August 2023. In her capacity as Faculty Senate President, Susan James served as a member of the UWF Board of Trustees. Trustee James served on the Board's Academic Affairs Committee and on the 2023 Officer Nominations Ad Hoc Committee.

Implementation Plan:

N/A

Fiscal Implications:

N/A

Relevant Authority:

N/A

Supports Strategic Direction(s):

N/A

Supporting Documents:

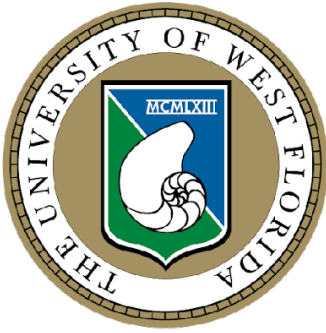
1. Resolution

Prepared by:

Anna Lochas, Board of Trustees Liaison

Presenter:

Rebecca Matthews, Board of Trustees Chair



BOARD OF TRUSTEES

IN RECOGNITION AND PROFOUND APPRECIATION
OF DISTINGUISHED SERVICE

TRUSTEE SUSAN JAMES

WHEREAS,

Trustee Susan James served with distinction on the University of West Florida Board of Trustees from August 2023 to August 2025,

WHEREAS,

Trustee James served with distinction on the Board of Trustees Academic Affairs Committee and on the 2023 Officer Nominations Ad Hoc Committee; and

WHEREAS,

Trustee James represented the Faculty Senate, the principal governing body of the UWF faculty, during those years, serving as its President; and

WHEREAS,

Trustee James used her position as trustee to encourage discussion and interest in the issues affecting UWF faculty, students, and staff; and

WHEREAS,

Trustee James is a valued Professor in the UWF Department of Teaching, Leadership, and Research, dedicated to her students, research, and service; and

WHEREAS,

Trustee James served with distinction as the founder and Director of the Emerald Coast National Writing Project at UWF; and

NOW, THEREFORE BE IT RESOLVED that The University of West Florida Board of Trustees, at its regular meeting on this 18th day of September, the year of 2025, does hereby recognize and commend Trustee Susan James for her many contributions to the University of West Florida, and a copy of this resolution serves as a token of the board's sincerest thanks; and

BE IT FURTHER RESOLVED that this resolution will be included in the minutes of the September 18, 2025, Board of Trustees meeting.

Rebecca Matthews
Board of Trustees Chair

Board of Trustees
Board Meeting
September 18, 2025

Approval of the Updated and Final FY 24-25 University Carryforward Spending Plan and the University Fixed Capital Outlay Budget

Recommended Action:

Approve the updated and final University Carryforward Spending Plan and University Fixed Capital Outlay Budget for Fiscal Year 2024-2025 reflecting results as of June 30, 2025.

Background Information:

Section 1011.45, Florida Statutes, End of Year Balance of Funds, and Board of Governors Regulation 9.007, State University Operating Budgets and Requests, require Board of Trustees (BOT) and Board of Governors (BOG) approval of university carryforward expenditure plans. In addition, Board of Governors Regulation 14.003, Fixed Capital Outlay Projects-University Budgeting Procedures, requires BOT and BOG approval of the Fixed Capital Outlay (FCO) Budget. Pursuant to these requirements, the BOG mandates that, by October 1 of each year, universities submit BOT-approved and certified operating, carryforward, and fixed capital outlay budgets for the upcoming fiscal year.

The UWF BOT approved the original FY 2024–25 Carryforward Spending Plan and FCO Budget at its September 12, 2024, full board meeting and authorized the President to make subsequent changes as necessary. The BOT received its first informational update on November 30, 2024, at the February 13, 2025, committee meetings, and its second informational update on March 31, 2025, at the May 8, 2025, committee meetings. The report now before the Board represents the final update for FY 2024–25, reflecting operating results through June 30, 2025, with bulleted changes presented for BOT approval in accordance with statute and regulation.

Implementation Plan:

Once approved by the BOT, the university will submit the final report to the Board of Governors.

Fiscal Implications:

Reporting back to the Board of Trustees on the actual operating results of the Carryforward and Fixed Capital Outlay Spending Plans ensures accountability and transparency in the use of institutional resources. This fiscal oversight provides the Board with assurance regarding \$54.3 million in estimated Carryforward expenditures and more than \$97.4 million in estimated Fixed Capital Outlay spending, reinforcing prudent stewardship, alignment with approved priorities, and strong governance of university financial resources.

Relevant Authority:

Florida Statute 1011.45, End of Year Balance of Funds
BOG Regulation 9.007, State University Operating Budgets and Requests
BOG Regulation 14.003, Fixed Capital Outlay Projects-University Budgeting Procedures

Supports Strategic Direction(s):

Strategic Direction 5: Infrastructure and Strategic Direction 6: Operational Excellence

Supporting Documents:

1. FY24-25 CF and FCO Budgets as of June 30, 2025, Power Point (2 pages)
2. 2025-26 E&G Carryforward Spending Plan as of June 30, 2025 (6 pages)
3. 2025-26 University Fixed Capital Outlay Budget Plan as of June 30, 2025 (3 pages)
4. BOG Regulation 9.007, State University Operating Budgets and Requests
5. BOG Regulation 14.003, Fixed Capital Outlay Projects-University Budgeting Procedures

Prepared by:

- Jeffrey A. Djerlek, Senior Associate Vice President for Finance and University Controller
- Sharon Jordan, Associate Controller of Reporting
- Desmond Peters, Academic Affairs Associate Director of Budgets
- Janet Davis, President's Division Business Manager
- Angela Wallace, Finance & Administration Director of Budgets
- Daniel Lucas, Associate Vice President of Advancement
- Pamela Cadem, Director of Budgets, DAESA
- Sarah Bloxson, Coordinator I

Presenter:

Jeffrey A. Djerlek, Senior Associate Vice President for Finance and University Controller

Carryforward

- **\$54.2M** Beginning Balance of Cash/Investments of Carryforward
 - **\$4.2M** in encumbrances
 - **\$12.6M** is the 7% of E&G required reserve
- **\$37.4M** available for the detailed Carryforward Spending Plan
- **Activity** as of June 30, 2025
 - **\$17.9M** – Spent
 - **3.6M** – Restricted Projects
 - **\$15.9M** – Committed Projects

Key Adjustments

- **\$1.2M** Research Lab Renovations & Deferred Maintenance
 - **\$1.4M** Mechanical Engineering Expansion (Port of Pensacola)
-

Fixed Capital Outlay Budget

- **\$97.4M** Total Project Budget
- **Key Update**
 - **\$1.1M** Entrance and Visitor Center Redesign Phase 1B

University of West Florida
Education and General
2024-2025 Carryforward Spending Plan Summary
Approved by University Board of Trustees
Balances and Spending Plans as of June 30, 2025

					100	214	235	475	500	969-ITS	S010	969-No IT or S	969
	University E&G	Special Unit or Campus (Title)	Grand Total :		President's	Advancement	Fin & Admin	Student Affs	Academic Affs	Central	Central	Central	Central
A.	Beginning E&G Carryforward Balance - July 1, 2024 :												
	Cash	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Investments	\$ 54,263,949	\$ -	\$ 54,263,949	\$ 1,987,259	\$ 757,555	\$ 14,058,634	\$ 2,254,555	\$ 33,117,542	\$ 2,759,816	\$ (3,352,407)	\$ 2,680,995	\$ 2,088,404
	Accounts Receivable	\$ 2,669	\$ -	\$ 2,669	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,669	\$ 2,669
	Less: Accounts Payable	\$ 27,318	\$ -	\$ 27,318	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 27,318	\$ 27,318
	Less: Deferred Student Tuition & Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B.	Beginning E&G Carryforward Balance (Net of Payables/Receivables/Deferred Fees) :												
		\$ 54,239,300	\$ -	\$ 54,239,300	\$ 1,987,259	\$ 757,555	\$ 14,058,634	\$ 2,254,555	\$ 33,117,542	\$ 2,759,816	\$ (3,352,407)	\$ 2,656,346	\$ 2,063,755
C.	Fiscal Year 2023-2024 E&G Carryforward Encumbrances Brought Forward:												
		\$ 4,238,898	\$ -	\$ 4,238,898	\$ 1,612	\$ -	\$ 3,769,398	\$ 9,784	\$ 184,872	\$ 176,787	\$ -	\$ 96,445	\$ 273,232
D.	7% Statutory Reserve Requirement (1011.45(1) F.S.):												
		\$ 12,560,286	\$ -	\$ 12,560,286	\$ 107,970	\$ 72,281	\$ 1,176,690	\$ 482,162	\$ 11,562,104	\$ 550,000	\$ (3,352,407)	\$ 1,961,486	\$ (840,921)
E.	Carryforward Reserve Fund (1011.45(3) F.S.):												
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
F.	E&G Carryforward Balance Less 7% Statutory Reserve Requirement (Amount Requiring Approved Spending Plan) :												
		\$ 37,440,116	\$ -	\$ 37,440,116	\$ 1,877,677	\$ 685,274	\$ 9,112,546	\$ 1,762,609	\$ 21,370,566	\$ 2,033,029	\$ -	\$ 598,415	\$ 2,631,444
G.	Annual Contribution to Reserves for New FCO Projects (per s. 1001.706(12) F.S. and Board Reg 14.002) (Should agree with the "Total Facilities Reserves as of June 30, 2025" on the "Details - FCO Reserves" tab)												
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
H.	* Restricted / Contractual Obligations												
	Restricted by Appropriations	\$ 563,066	\$ -	\$ 563,066	\$ 563,066	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	University Board of Trustees Reserve Requirement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Restricted by Contractual Obligations :												
	Compliance, Audit, and Security												
	Compliance Program Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Audit Program Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Campus Security and Safety Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Academic and Student Affairs												
	Student Services, Enrollment, and Retention Efforts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Student Financial Aid	\$ 3,026,160	\$ -	\$ 3,026,160	\$ -	\$ -	\$ -	\$ -	\$ 3,026,160	\$ -	\$ -	\$ -	\$ -
	Faculty/Staff, Instructional and Advising Support and Start-up Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Faculty Research and Public Service Support and Start-Up Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Library Resources	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Facilities, Infrastructure, and Information Technology												
	Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Information Technology (ERP, Equipment, etc.)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Small Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Large Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Other UBOT Approved Operating Requirements												
	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Contingencies for a State of Emergency Declared by the Governor (Section 1011.45(3)(g))	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Operating Restricted : (Should agree with restricted column totals on "Details-Operating" tab)												
		\$ 3,589,226	\$ -	\$ 3,589,226	\$ 563,066	\$ -	\$ -	\$ -	\$ 3,026,160	\$ -	\$ -	\$ -	\$ -
	FCO Restricted : (Should agree with restricted column totals on "Details-Fixed Capital Outlay" tab)												
		\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
	Grand Total Restricted / Contractual Funds :												
		\$ 3,589,226	\$ -	\$ 3,589,226	\$ 563,066	\$ -	\$ -	\$ -	\$ 3,026,160	\$ -	\$ -	\$ -	\$ -
I.	* Commitments												
	Compliance, Audit, and Security												
	Compliance Program Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

University of West Florida
Education and General
2024-2025 Carryforward Spending Plan Summary
Approved by University Board of Trustees
Balances and Spending Plans as of June 30, 2025

	University E&G	Special Unit or Campus (Title)	Grand Total : University Summary	100 President's	214 Advancement	235 Fin & Admin	475 Student Affs	500 Academic Affs	969-ITS Central	S010 Central	969-No IT or S Central	969 Central
Audit Program Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Campus Security and Safety Enhancements	\$ 38,700	\$ -	\$ 38,700	\$ -	\$ -	\$ 38,700	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Academic and Student Affairs												
Student Services, Enrollment, and Retention Efforts	\$ 554,965	\$ -	\$ 554,965	\$ -	\$ 73,503	\$ -	\$ 481,462	\$ -	\$ -	\$ -	\$ -	\$ -
Student Financial Aid	\$ 27,079	\$ -	\$ 27,079	\$ -	\$ -	\$ -	\$ 27,079	\$ -	\$ -	\$ -	\$ -	\$ -
Faculty/Staff, Instructional and Advising Support and Start-up Funding	\$ 125,455	\$ -	\$ 125,455	\$ -	\$ -	\$ -	\$ -	\$ 125,455	\$ -	\$ -	\$ -	\$ -
Faculty Research and Public Service Support and Start-Up Funding	\$ 315,647	\$ -	\$ 315,647	\$ -	\$ -	\$ -	\$ 315,647	\$ -	\$ -	\$ -	\$ -	\$ -
Library Resources	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Facilities, Infrastructure, and Information Technology												
Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Information Technology (ERP, Equipment, etc.)	\$ 3,161,423	\$ -	\$ 3,161,423	\$ -	\$ -	\$ -	\$ 24,764	\$ 2,977,717	\$ 158,942	\$ -	\$ -	\$ 158,942
Small Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))	\$ 696,295	\$ -	\$ 696,295	\$ -	\$ -	\$ 696,295	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Large Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))	\$ 525,562	\$ -	\$ 525,562	\$ -	\$ -	\$ 525,562	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other UBOT Approved Operating Requirements												
Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	\$ 10,496,653	\$ -	\$ 10,496,653	\$ 495,413	\$ -	\$ 1,982,015	\$ -	\$ 7,801,290	\$ -	\$ -	\$ 217,935	\$ 217,935
Contingencies for a State of Emergency Declared by the Governor (Section 1011.45(3)(g))	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operating Commitments : (Should agree with committed column total on "Details-Operating" tab)	\$ 14,719,922	\$ -	\$ 14,719,922	\$ 495,413	\$ 73,503	\$ 2,020,715	\$ 848,952	\$ 10,904,462	\$ 158,942	\$ -	\$ 217,935	\$ 376,877
FCO Commitments : (Should agree with committed column total on "Details-Fixed Capital Outlay" tab)	\$ 1,221,857	\$ -	\$ 1,221,857	\$ -	\$ -	\$ 1,221,857	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Grand Total Commitments :	\$ 15,941,779	\$ -	\$ 15,941,779	\$ 495,413	\$ 73,503	\$ 3,242,572	\$ 848,952	\$ 10,904,462	\$ 158,942	\$ -	\$ 217,935	\$ 376,877
J. Available E&G Carryforward Balance as of June 30, 2025:	\$ 17,909,111	\$ -	\$ 17,909,111	\$ 819,198	\$ 611,771	\$ 5,869,974	\$ 913,657	\$ 7,439,944	\$ 1,874,087	\$ -	\$ 380,480	\$ 2,254,567
K. Spent to Date as of June 30, 2025	\$ 17,909,111	\$ -	\$ -	\$ 819,198	\$ 611,771	\$ 5,869,974	\$ 913,657	\$ 7,439,944	\$ 1,874,087	\$ -	\$ 380,480	\$ 2,254,567
L. Available E&G Carryforward Balances as of June 30, 2025 after spending	\$ -			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

* Please provide supplemental **detailed descriptions** for these multiple-item categories in sections F, G, and H for operating, fixed capital outlay, and FCO Reserves spending plans using Board of Governors templates provided (use worksheet tabs for "Details" included with this file).

Notes :

- Florida Polytechnic University amounts include the Phosphate Research Trust Fund.
-

2024 House Bill 707 amended 1011.45 F.S. regarding university Education & General carryforward minimum reserve balances, reporting requirements, and allowable uses. 1011.45(1) states that "Each university shall maintain a minimum carry forward balance in of at least 7 percent of its state operating budget; however, a university may retain and report to the Board of Governors an annual reserve balance exceeding that amount. The spending plan shall be submitted to the university's board of trustees for review, approval, or if necessary, amendment by September 1, 2020, and each September 1 board of trustees for review, approval, or if necessary, amendment by September 1, 2020, and each September 1 thereafter. The Board of Governors shall review, approve, and amend if necessary, each university's carry forward spending plan by October 1, 2020, and each October 1 thereafter." 1011.45(3) adds "A university's carry forward spending plan must include the estimated cost per planned expenditure and a timeline for completion of the expenditure." Three additional tabs are provided with this file to allow reporting of university detailed expenditure plans for each planned expenditure or project, a completion timeline, and amount budgeted for expenditure during the reporting fiscal year.

University of West Florida

2024-2025 University E&G Carryforward Spending Plans - Supplemental Details (Operating Plans)

Pursuant to 1011.45, Florida Statutes

June 30, 2025

Line Item #	Division	Carryforward Spending Plan Category	Specific Expenditure/Project Title	Budget						Project Timeline			Comments/Explanations
				Total Amount to be Funded from Current Year E&G Carryforward Balance	ENCUMBERED Section C Balance as of June 30, 2025	RESTRICTED Restricted Balance as of June 30, 2025	COMMITTED Committed Balance as of June 30, 2025	SPENT TO DATE Section J Spent Balance as of June 30, 2025	Unallocated	Total # Years of Expenditure per Project	Current Expenditure Year #	Estimated Completion Date (Fiscal Year)	
1	100	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	President's Office	\$ 718,533	\$ 1,612	\$ -	\$ 495,413	\$ 221,508	\$ -	1	1	2025	Limited/Time Specific Employment, including leave payouts; One-time/Annual Contracts; consultant fees, performance incentives, furniture, travel, professional development; Association of Governing Boards (AGB) membership; New cubicle build-out (includes walls, panels)
2	100	Restricted by Appropriations	Small Business Development Center (SBDC)	\$ 1,160,756	\$ -	\$ 563,066	\$ -	\$ 597,690	\$ -	1	1	2025	Conference registrations and travel; Small Business Success Summit; SBDC Network PD conference; Professional development for State Office Personnel
3	214	Student Services, Enrollment, and Retention Efforts	Div. of Advancement Student and OPS, Equipment & Materials	\$ 612,973	\$ -		\$ 73,503	\$ 539,470	\$ -	3	3	2025	Advancement Student and staff OPS, Phonathon students, equipment, services, materials, software, leave payouts as needed.
4	214	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Brand Campaign/Marketing/Institutional Communications	\$ 72,301				\$ 72,301	\$ -	1	1	2025	Office of Institutional Communications Branding/Marketing, services, branding contracts, OPS, , leave payouts, advertising media, equipment, software, materials as needed.
5	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Finance and Admin Division-Equipment and Supplies	\$ 123,339	\$ -	\$ -	\$ 17,520	\$ 105,819	\$ -	1	1	2025	Equipment and supplies purchases for the division and for maintaining campus facilities (facility maintenance, environmental health & safety, utility operations, etc.).
6	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Finance and Admin Division-Repairs and Maintenance	\$ 32,310		\$ -		\$ 32,310	\$ -	1	1	2025	Chillers service/repairs, water piping repairs, pressure washing, etc.
7	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Deferred Maintenance Projects	\$ 1,037,815	\$ 141,180	\$ -	\$ 474,666	\$ 421,969	\$ -	2	1	2026	Maintenance and repair projects in progress (e.g., HVAC repairs, etc.).
8	235	Campus Security and Safety Enhancements	University Police and Environmental Health & Safety-Vehicle Replacements; University Police Software Renewals; Asbestos Surveys; AEDs; Fire Simulator	\$ 435,007	\$ 129,029	\$ -	\$ 38,700	\$ 267,278	\$ -	3	2	2026	Purchase of new vehicles and vehicles equipment for University Police; purchase of vehicle equipment for Envior Health & Safety; asbestos surveys for campus buildings; University Police annual software renewals; AEDs for patrol vehicles; fire simulator, etc.
9	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Facility Maintenance-Vehicle Purchase	\$ 59,206		\$ -	\$ -	\$ 59,206	\$ -	1	1	2025	Purchase of new vehicle and vehicle equipment for Facility Maintenance.
10	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Facilities Management-Furniture (Expense)	\$ 10,000		\$ -	\$ -	\$ 10,000	\$ -	1	1	2025	Classroom furniture purchase-adjustable height stools for faculty (Qty 35), which are ADA compliant, to use with the new ADA classroom podiums.
11	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Southside Dorms Demolition Project	\$ -		\$ -	\$ -		\$ -	1	1	2025	REMOVED: Southside Dorms Demolition project to remove fourteen (14) buildings.
12	235	Campus Security and Safety Enhancements	B32 Elevator Renovation Project	\$ 308,880	\$ -		\$ -	\$ 308,880	\$ -	2	2	2025	Elevator upgrades for two (2) elevators in the B32 Pace Library (safety improvements) project still in progress.
13	475	Student Financial Aid	DoS Emergency Scholarships	\$ 15,000	\$ -	\$ -	\$ 765	\$ 14,235	\$ -	1	1	2025	CF4300-Dean of Students Emergency Scholarships for students in an emergency situation
14	475	Student Services, Enrollment, and Retention Efforts	Disabled Aid Assistance	\$ 102,953	\$ 1,600	\$ -	\$ 50,752	\$ 50,601	\$ -	3	2	2026	CF4512 Funds carried over from E&G that is specifically identified for use on needs of the disabled , campus wide or individual needs.
15	475	Student Services, Enrollment, and Retention Efforts	Divisional OPS Needs	\$ 337,795	\$ -	\$ -	\$ 46,628	\$ 291,167	\$ -	1	1	2025	CF4665 Division wide use for all OPS. Transfer \$17K from Item 15 to Item 27
16	475	Student Services, Enrollment, and Retention Efforts	Divisional Contract & Service Needs	\$ 88,006	\$ -	\$ -	\$ 76,718	\$ 11,288	\$ -	1	1	2025	CF4666 Division wide use for contract & service needs including background checks. \$4.2K increase to reserve funds
17	475	Student Financial Aid	DAESA Scholarships	\$ 26,564	\$ -	\$ -	\$ 26,314	\$ 250	\$ -	1	1	2025	CF4667 Division wide use for scholarships. Moved \$2.4K to leave liability to cover estimate line 20
18	475	Student Services, Enrollment, and Retention Efforts	Divisional Furniture, Equipment, and Maintenance Needs	\$ 55,000	\$ 8,184	\$ -	\$ 24,924	\$ 21,892	\$ -	1	1	2025	CF4668 Division wide use for furniture, equipment, and maintenance needs
19	475	Student Services, Enrollment, and Retention Efforts	Divisional Misc. Expenditure Needs	\$ 10,000	\$ -	\$ -	\$ 358	\$ 9,642	\$ -	1	1	2025	CF4669 Division wide misc. expenditure needs
20	475	Student Services, Enrollment, and Retention Efforts	Leave Liability, Unemployment, OPS Health insurance, Bonuses, etc.	\$ 224,033	\$ -		\$ 221,568	\$ 2,465	\$ -	1	1	2025	CF5022 Divisional use for Leave Liability, Unemployment, OPS Health insurance, Bonuses, etc. Move out \$2K for Co-Sponsor Student Retention Init to AA. Move out \$33K from Item 20 to Item 28 to cover Phase 1 Educational & Community Garden.
21	475	Faculty Research and Public Service Support and Start-Up Funding	Community Garden Improvements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	1	1	2025	CF5032 This is the HIP High Impact Practices / Quality Enhancement Projects funds that rolled from E&G. Moved \$19K out to Community Garden Line 28.
22	475	Student Services, Enrollment, and Retention Efforts	Non recurring salary & fringe	\$ 150,001	\$ -	\$ -	\$ 8,394	\$ 141,607	\$ -	1	1	2025	CF5036 Division wide non-recurring salary & fringe.
23	475	Student Services, Enrollment, and Retention Efforts	Retention Team Events, Training, & Scholarships	\$ 146,088	\$ -	\$ -	\$ 47,143	\$ 98,945	\$ -	3	3	2025	CF5041 This was a 3 year commitment for the retention team to use as needed for scholarships, events, and training.
24	475	Information Technology (ERP, Equipment, etc.)	ITS Equipment Replacement	\$ 60,000	\$ -	\$ -	\$ 24,764	\$ 35,236	\$ -	1	1	2025	CF5081 ITS equipment replacement based on a continuous 5 year replacement policy for DAESA computers.
25	475	Student Financial Aid	LAC Scholarships	\$ 14,800	\$ -	\$ -	\$ -	\$ 14,800	\$ -	1	1	2025	CF5271 This is E&G that rolls over specifically for the LAC scholarships
26	475	Student Services, Enrollment, and Retention Efforts	International Recruitment-3rd party payments	\$ 124,696	\$ -	\$ -	\$ 400	\$ 124,296	\$ -	1	1	2025	CF5284 Rolls over from E&G to cover the International recruiters payments.

University of West Florida

2024-2025 University E&G Carryforward Spending Plans - Supplemental Details (Operating Plans)

Pursuant to 1011.45, Florida Statutes

June 30, 2025

Line Item #	Division	Carryforward Spending Plan Category	Specific Expenditure/Project Title	Budget						Project Timeline			Comments/Explanations
				Total Amount to be Funded from Current Year E&G Carryforward Balance	ENCUMBERED Section C Balance as of June 30, 2025	RESTRICTED Restricted Balance as of June 30, 2025	COMMITTED Committed Balance as of June 30, 2025	SPENT TO DATE Section J Spent Balance as of June 30, 2025	Unallocated	Total # Years of Expenditure per Project	Current Expenditure Year #	Estimated Completion Date (Fiscal Year)	
27	475	Student Services, Enrollment, and Retention Efforts	International Student Recruitment transcript reviews	\$ 90,354	\$ -	\$ -	\$ 4,577	\$ 85,777	\$ -	3	3	2025	CF5285-Rolled over from E&G to be used for International Student Recruitment transcript reviews. This is year 3 of 3. Transfer \$17K from Item 15 to Item 27
28	475	Faculty Research and Public Service Support and Start-Up Funding	Community Garden Improvements	\$ 327,103	\$ -	\$ -	\$ 315,647	\$ 11,456	\$ -	3	3	2025	CF7473 balance of 3 year commitment to be used specifically for the Educational & Community Garden (AKA Community Garden). Move \$20K to Fin & Admin for minor projects. Transfer \$33K from Item 20 to Item 28.
29	500	Student Financial Aid	Academic Affairs Scholarships	\$ 2,000,000	\$ -	\$ 617,190		\$ 1,382,810	\$ -	1	1	2025	Academic Scholarships and student financial aid
30	500	Student Financial Aid	Academic Affairs Scholarships Packaging for Next Term	\$ 2,000,000	\$ -	\$ 2,000,000		\$ -	\$ -	2	1	2026	Packaging amounts for the next fall and spring scholarships awards. Amounts must be set aside in advance in order to send new students awards notifications.
31	500	Faculty/Staff, Instructional and Advising Support and Start-up Funding	Academic Affairs Temporary employees compensation	\$ 240,678	\$ -		\$ 2,742	\$ 237,936	\$ -	1	1	2025	Salaries for temporary employees
32	500	Information Technology (ERP, Equipment, etc.)	Information technology, network infrastructure, software, equipment and other mission critical needs	\$ 2,054,443	\$ 77,763		\$ 731,353	\$ 1,245,327	\$ -	2	1	2025	Funding for Information technology, network infrastructure, software, equipment and other mission critical needs
33	500	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Strategic Initiatives, Academic Program Investments.	\$ 9,215,174	\$ -		\$ 7,801,290	\$ 1,413,884	\$ -	1	1	2025	Funding for academic programs with costly replacement technology, and new academic program analysis and development to keep in line the strategic enrollment initiative of the University's Strategic Master Plan. Expansion of Mechanical Engineering at Port of Pensacola.
34	500	Faculty/Staff, Instructional and Advising Support and Start-up Funding	Nursing Faculty salaries and compensation	\$ 655,298	\$ -		\$ 122,713	\$ 532,585	\$ -	1	1	2025	Nursing Faculty summer salaries
35	500	Information Technology (ERP, Equipment, etc.)	Nursing equipment and technology needs	\$ 2,745,969	\$ 107,109		\$ 2,246,365	\$ 392,495	\$ -	1	1	2025	Nursing labs equipment and technology needs
36	500	Student Financial Aid	Nursing Scholarships	\$ 143,876	\$ -			\$ 143,876	\$ -	1	1	2025	Nursing LINE scholarships Santa Rosa Medical Center, Baptist Hospital and Ascension
37	500	Student Financial Aid	Nursing Scholarships	\$ 2,500,000	\$ -	\$ 408,970		\$ 2,091,030	\$ -	3	1	2027	Nursing scholarships to be awarded over the course of three - four years
38	969-9703	Information Technology (ERP, Equipment, etc.)	Oracle On-line Temp Licenses	\$ 281,567	\$ 86,723		\$ 1,602	\$ 193,242	\$ -	1	1	2025	Funding for Oracle additional temp. licenses
39	969-9711	Information Technology (ERP, Equipment, etc.)	ERP Training for new employees	\$ 62,262	\$ 35,985		\$ 18,587	\$ 7,690	\$ -	1	1	2025	Funding for ERP training, consultation and other services
40	969-9804	Information Technology (ERP, Equipment, etc.)	Server Equipment Replacement	\$ 59,584	\$ -			\$ 59,584	\$ -	1	1	2025	Funding for infrastructure equipment
41	969-9879	Information Technology (ERP, Equipment, etc.)	Security Items	\$ 14,000			\$ -	\$ 14,000	\$ -	1	1	2025	Security Awareness Training for new Staff
42	969	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Deferred Maintenance Projects	\$ 694,859	\$ 96,444	\$ -	\$ 217,935	\$ 380,480	\$ -	2	1	2026	Maintenance and repair projects.
43	969-9703	Information Technology (ERP, Equipment, etc.)	Oracle On-line Temp Licenses	\$ 4,246			\$ 4,246		\$ -	1	1	2025	Oracle Licenses for FY2425
44	969-9711	Information Technology (ERP, Equipment, etc.)	Banner Student Costs	\$ 886,062	\$ -		\$ -	\$ 886,062	\$ -	1	1	2025	Banner Student software maintenance and licenses to run processes
45	969-9804	Information Technology (ERP, Equipment, etc.)	Server Equipment Replacement & Licenses	\$ 602,303	\$ 54,079		\$ 128,613	\$ 419,611	\$ -	1	1	2025	Funding for infrastructure equipment & software licenses
46	969-9879	Information Technology (ERP, Equipment, etc.)	Security Items	\$ 73,642	\$ -		\$ 5,894	\$ 67,748	\$ -	1	1	2025	Security Awareness Training for new Staff and security software licenses
47	969-9833	Information Technology (ERP, Equipment, etc.)	University Academic Software Licenses	\$ 226,150			\$ -	\$ 226,150	\$ -	1	1	2025	Security Awareness Training for new Staff and security software licenses
48	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	B50 Furniture	\$ 497,429	\$ -	\$ -	\$ -	\$ 497,429	\$ -	1	1	2025	New furniture purchases for B50.
49	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	B58 Labs Renovations	\$ 2,541,568	\$ 838,521	\$ -	\$ 1,489,829	\$ 213,218	\$ -	2	1	2026	Research labs renovations projects planned for Biology and Chemistry.
Total as of June 30, 2025: *				\$ 33,842,623	\$ 1,578,229	\$ 3,589,226	\$ 14,719,923	\$ 13,955,245	\$ -				

*Note: Should agree with respective restricted/contractual and/or committed category totals on "Summary" tab.

University of West Florida

2024-2025 University E&G Carryforward Spending Plans - Supplemental Details (Fixed Capital Outlay Project Plans)

Pursuant to Section 1011.45, Florida Statutes

30-Jun-25

Line Item #	Carryforward Spending Plan Category	Specific Project Title/Name	Project Description	Amount of June 30, 2025, E&G Carryforward Operating Balance Provided to FCO Project2 (F+G)	Encumbered As of June 30, 2025	(H)	Restricted	(I)	Committed	Spent to Date As of June 30, 2025	Unallocated	Carryforward Expenditure Timeline			Comments/Explanations
						To Restricted Balance on June 30, 2025	To Committed Balance on June 30, 2025	Total # Years of Expenditures per Project	Current Expenditure Year #			Estimated Completion Date (Fiscal Year)			
Small Carryforward Projects ¹															
1	Small, < \$2M: Renovation, Repair or Maintenance	Community Gardens	Community Gardens-Tiered/Terraced	\$ 575,490	\$ -	\$ -	\$ -	\$ 575,490	\$ -	2	2	2025	Project is complete.		
2	Small, < \$2M: Renovation, Repair or Maintenance	Building 80-Interior Build-Out	Building 80-Interior Build-Out	\$ 1,434,216	\$ 67,586	\$ -	\$ -	\$ 1,366,630	\$ -	2	1	2026	Project is not yet complete and will be extended into the next fiscal year.		
3	Small, < \$2M: Renovation, Repair or Maintenance	B19/B37/B38 Electrical Equipment Replacement	B19/B37/B38 Electrical Equipment Replacement	\$ 27,331	\$ -	\$ -	\$ -	\$ 27,331	\$ -	1	1	2025	Project engineering design phase is now complete. Construction phase is currently on hold.		
4	Small, < \$2M: Renovation, Repair or Maintenance	B88 Generator Replacement	B88 (WUWF Radio Station) Generator Replacement	\$ 185,676	\$ -	\$ -	\$ -	\$ 185,676	\$ -	1	1	2025	Project is complete.		
5	Small, < \$2M: Renovation, Repair or Maintenance	Entrance & Visitor Center Redesign PHASE 1B	Entrance & Visitor Center PHASE 1B - DESIGN ONLY	\$ 784,005	\$ 70,742	\$ -	\$ 696,295	\$ 16,968	\$ -	2	1	2026	New Project started in FY24-25 and is currently in the design phase. Additional funds allocated in FY 2024-25 for future construction.		
6	Small, < \$2M: Renovation, Repair or Maintenance	Gateway Entrance Cameras	Main Entrance Camera System and Related Infrastructure	\$ 117,805	\$ 117,805	\$ -	\$ -	\$ -	\$ -	2	1	2026	New Project started in FY24-25.		
* Total Minor Carryforward As of June 30, 2025:				\$ 3,124,523	\$ 256,133	\$ -	\$ 696,295	\$ 2,172,095	\$ -						
Large Carryforward Projects ¹															
7	Large, > \$2M: Completion of Remodeling or Infrastructure	Building 54-Fire Mitigation	Building 54 fire mitigation retrofit project	\$ 647,299	\$ 308,755	\$ -	\$ 1,167	\$ 337,377	\$ (0)	5	4	2026	Funds estimated to be needed to cover additional costs for the Bldg. 54, Fire Mitigation (PECO) project. Project is not yet complete and will be extended into the next fiscal year.		
8	Large, > \$2M: Completion of Remodeling or Infrastructure	University Park - Ath Operations Bldg.	Building 234-Athletic Training Center Addition	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	6	5	2026	\$1,388,920 CF funds needed to cover additional costs for the Bldg. 234-Athletic Training Center Addition (CITF) project were spent in full in FY 2023-24. Project is not yet complete and will be extended into the next fiscal year.		
9	Large, > \$2M: Renovation, Repair or Maintenance	Entrance & Visitor Center Redesign	Entrance & Visitor Center Redesign	\$ 1,048,809	\$ -	\$ -	\$ -	\$ 1,048,809	\$ -	4	3	2026	\$1,048,809 CF funds needed to cover additional costs for the Entrance & Visitor Center Redesign (CITF) project were spent in full in FY 2024-25. Project is not yet complete and will be extended into the next fiscal year.		
10	Large, > \$2M: Renovation, Repair or Maintenance	Campus Deferred Maintenance Projects	Building Renovations (B50)	\$ 515,759	\$ 110,210	\$ -	\$ 9,965	\$ 395,584	\$ -	4	3	2026	Funds estimated to be needed to cover additional costs for the Building Renovations B50 SFRF-DM project.		
11	Large, > \$2M: Renovation, Repair or Maintenance	Campus Deferred Maintenance Projects	300K Gallon Water Storage Tank	\$ 2,500,000	\$ 1,985,570	\$ -	\$ 514,430	\$ -	\$ -	4	3	2026	Funds estimated to be needed to cover additional costs for the 300K Gallon Water Storage Tank SFRF-DM project.		
* Total Major Carryforward As of June 30, 2025:				\$ 4,711,867	\$ 2,404,535	\$ -	\$ 525,562	\$ 1,781,770	\$ (0)						
Fixed Capital Outlay Totals :				\$ 7,836,390	\$ 2,660,668	\$ -	\$ 1,221,857	\$ 3,953,865	\$ (0)						

* Should agree with respective restricted/contractual and/or committed category totals on "Summary" tab.

1. As defined in Board of Governors Regulation 14.003.
2. Amount deducted from June 30, 2025, beginning E&G Carryforward operating balance for fixed capital outlay project funding per Section 1011.45, F.S. and Board of Governors Regulation 9.007(3)(a)(4).

University of West Florida

University Facilities Reserves

Additional Amounts Contributed From June 30, 2025 Beginning E&G Carryforward Balance

Pursuant to s. 1001.706(12) F.S. and Board of Governors Regulation 14.002

	Specific Project/Facility Title/Number	Additional Description of Project/Facility	Amount Added to Facility Reserves From FY25 Beginning E&G Carryforward Balance
1.	Building 54-Fire Mitigation	Building 54 fire mitigation retrofit project (1% escrow)	\$ 75,909
2.			\$ -
3.			\$ -
4.			\$ -
5.			\$ -
6.			\$ -
7.			\$ -
8.			\$ -
9.			\$ -
10.			\$ -
		Total Capital Facilities Reserves as of June 30, 2025 : *	\$ 75,909

***Note:** Should agree with line G on the "Summary" tab.

The University of West Florida
FIXED CAPITAL OUTLAY BUDGET for Fiscal Year 2024-25
As of June 30, 2025
(per s. 1013.61, F.S. and Board Reg. 14.003)

University Contact: Mr. James Manor jmanor@uwf.edu (850) 474-2005
[name] [email & phone]

CFSP item #	Category	Project Title/Name	Description	Total Project Budget Allocation (Total Estimated Project Cost)	Funding Source(s)		Funds Expended Since Inception	Estimated Amt of Funds to be Expended this Year	Remaining Balance	Estimated Project Timeline		Comments
					Source	Amount				Start Date	Completion Date	
	Education & General (E&G) Operating Projects ¹			\$0	E&G Operating Funds	\$0	\$0	\$0	\$0			
	Carryforward (CF) - Small Projects ²			\$3,124,523	CF	\$3,124,523	\$2,172,095	\$0	\$952,428	Refer to detail in Carryforward Spending Plan	Community Gardens project, B80 Interior Build-Out, B19/B37/B38 Electrical Equipment Replacement project, B88 (WUWF Radio Station) Generator Replacement project, Entrance and Visitor Center Redesign Phase 1B project design, and B73 Pool Filtration installation project moved 100% to CITF funding and Green Fee funding in FY25 (see below).	
	Details listed on the CF Sheet											
				\$524,013	Auxiliary (\$227,513 Student Activities funding transferred to Auxiliary FCO project account for Community Gardens Tiered/Terraced project and Wooden Boardwalk project; \$296,500 Transportation Services for Entrance & Visitor Ctr Redesign Ph 1B)	\$524,013	\$115,992	\$0	\$408,021			
Carryforward (CF) - Large Projects ³												
7	Building 54-Fire Mitigation YR22	Building 54 - Fire Mitigation to retrofit the entire building with firewalls, make adjustments to egress routes, sprinkler system installation, HVAC return air pathways, etc.	\$7,350,000	PECO/GR CF Total:	6,250,000 1,100,000 \$7,350,000	\$7,040,078	\$0	\$309,922	7/1/2021	6/30/2026	Bldg. 54 Fire Mitigation (PECO) project. Project is not yet complete and will be extended into the next fiscal year.	
8	University Park-Athletic Operations Bldg. YR21 & YR22	Building 234 - Athletic Training Center Addition, Phase I & Phase II	\$7,686,825	CITF CITF Foundation CF Foundation (Funding for Athletics) Athletics (Athletics Administrative Funds) Auxiliary Reserves (Unobligated Administrative Funds) Total:	1,224,315 785,121 3,439,572 1,388,920 240,738 5,100 <u>603,059</u> \$7,686,825	\$7,594,010	\$0	\$92,815	7/1/2020	6/30/2026	Project is nearing completion with final punch list and additional safety items in progress. Project is not yet complete and will be extended into the next fiscal year.	
9	Entrance and Visitor Center Redesign YR23 & YR24	Entrance and Visitor Center Redesign Phase 1A	\$2,090,664	CITF CITF CF Total:	753,888 287,967 <u>1,048,809</u> \$2,090,664	\$2,075,005	\$0	\$15,659	7/1/2022	6/30/2026	Project is nearing completion with final punch list items in progress. Project is not yet complete and will be extended into the next fiscal year.	
				SFRF - DM	\$15,370,831	\$10,934,938	\$0	\$4,435,893				

CFSP item #	Category	Project Title/Name	Description	Total Project Budget Allocation (Total Estimated Project Cost)	Funding Source(s)		Funds Expended Since Inception	Estimated Amt of Funds to be Expended this Year	Remaining Balance	Estimated Project Timeline		Comments
					Source	Amount				Start Date	Completion Date	
10 & 11	Campus Deferred Maintenance Projects	Projects include HVAC upgrades, building renovations, electrical upgrades, road repairs, roof replacements, etc.; Road and Sidewalk Improvements (Campus Wide): repair and repave roadway (additional Auxiliary funding); Building Renovations B50 (additional CF funding); 300K Gallon Water Storage Tank (additional CF funding); Roof Replacements-Phase I B85 (additional Auxiliary funding), etc.	\$19,528,557	CF	\$3,275,000	\$654,825	\$0	\$2,620,175				LBC approved list of SFRF-Deferred Maintenance projects; total \$15,370,831. Used for replace traffic mast arms project, Roof Replacements-Phase I B85 project, B40 Chiller Plant Rehab project, B38 windows and doors replacements project, B92 HVAC Upgrades, Stormwater Rehab, and the 300K Gallon Water Storage Tank project. Storage tank project construction services PO has been issued, but no expenditures through June 30, 2025. Projects are currently in progress.
				Auxiliary (Transportation Services \$743,500; Administrative Funds Allocations \$139,226)	\$882,726	\$508,736	\$0	\$373,990	7/1/2022	12/31/2026		
				Total:								
					Subtotal - CF Large Projects:	\$36,656,046	\$28,807,592	\$0	\$7,848,454			
	State Appropriated Projects ^{4,6}											
	Critical Fire Alarm Systems Replacements (renov.)	Project to replace the control panels for aging fire alarm systems in multiple buildings.	\$1,050,000	SFRF-PECO	\$1,050,000	\$997,161	\$0	\$52,839	7/1/2022	12/31/2026	Per FY23 GAA, Section 197, State Fiscal Recovery Funding "Public Education Capital Outlay."	
	Critical Roof Replacements (renov.)	Roof replacements for nine (9) campus buildings.	\$5,111,000	SFRF-PECO	\$5,111,000	\$4,369,747	\$0	\$741,253	7/1/2022	12/31/2026	Per FY23 GAA, Section 197, State Fiscal Recovery Funding "Public Education Capital Outlay."	
	Replacements of HVAC Systems and Utility Distribution Systems (renov.)	HVAC systems upgrades within three (3) buildings and upgrades to select utility distribution systems across the campus.	\$2,335,000	SFRF-PECO	\$2,335,000	\$1,643,408	\$0	\$691,592	7/1/2022	12/31/2026	Per FY23 GAA, Section 197, State Fiscal Recovery Funding "Public Education Capital Outlay."	
	Replacements of HVAC Systems and Utility Distribution Systems (renov.)	HVAC systems upgrades within three (3) buildings and upgrades to select utility distribution systems across the campus.	\$148,089	Auxiliary (Administrative Funds Allocations)	\$148,089	\$3,949	\$0	\$144,140	7/1/2022	12/31/2026	Additional Auxiliary funding for the B82 & B21 HVAC Replacement projects. \$11,683 reallocated from B82 HVAC Replacement project to SFRF Deferred Maintenance project B38 windows and doors replacements.	
	Science and Engineering Research Wing (SF 3194) YR24	Bldg. 129 - Science and Engineering Research Wing	\$21,122,335	PECO/GR	\$21,122,335	\$476,760	\$0	\$20,645,575	7/1/2023	6/30/2027	Architectural and engineering design services in progress.	
	Critical Infrastructure-Satellite Utilities Plant Phase I (SF 1461) (HF0361) YR24	Critical Infrastructure-Satellite Utilities Plant Phase I	\$10,000,000	PECO/GR	\$10,000,000	\$0	\$0	\$10,000,000	7/1/2023	6/30/2026	Architectural and engineering design services PO has been issued.	
	Critical Infrastructure-Satellite Utilities Plant Phase II (SF 1202) (HF2818) YR25	Critical Infrastructure-Satellite Utilities Plant Phase II	\$10,000,000	PECO/GR	\$10,000,000	\$0	\$0	\$10,000,000	7/1/2024	6/30/2027	Phase I design currently in progress.	
	HLS Outdoor Center YR22	Building 72 - HLS Outdoor Center Phase I	\$81,110	CITF	\$81,110	\$81,110	\$0	\$0	7/1/2021	6/30/2025	Project is complete.	
	HLS Outdoor Center YR23	Building 72 - HLS Outdoor Center Phase 2	\$103,890	CITF	\$103,890	\$103,890	\$0	\$0	7/1/2022	6/30/2025	Project is complete.	
	HLS Outdoor Center	Building 72 - HLS Outdoor Center	\$990	Auxiliary (Administrative Funds Allocations)	\$990	\$990	\$0	\$0	7/1/2022	6/30/2025	Project is complete.	
	B22 Outdoor Patio YR23	Building 22 - Outdoor Patio	\$150,000	CITF	\$150,000	\$69,413	\$0	\$80,587	7/1/2022	6/30/2026	Construction phase for the patio is in progress.	
	University Commons Patio YR25	Building 22 - Patio Ph 1A	\$105,280	CITF	\$105,280	\$0	\$0	\$105,280	7/1/2024	6/30/2026	Construction phase for the patio is in progress.	
	B22 University Commons Outdoor Patio	Building 22 - Outdoor Patio	\$36,012	Auxiliary (\$15,557 Student Activities funding transferred to Auxiliary FCO project account; \$20,455 Administrative Funds Allocations)	\$36,012	\$949	\$0	\$35,063	7/1/2024	6/30/2026	Additional Auxiliary funding for the B22 University Commons Outdoor Patio Phase 1 project. Includes \$20,455 temporary funding for Ph 1B to begin in FY25. Ph 1B CITF funding planned for FY26.	
	Pen Air Field Bleachers YR25	Pen Air Field Bleachers Phase 1B	\$123,898	CITF	\$123,898	\$123,898	\$0	\$0	7/1/2024	6/30/2025	Project is complete.	

CFSP item #	Category	Project Title/Name	Description	Total Project Budget Allocation (Total Estimated Project Cost)	Funding Source(s)		Funds Expended Since Inception	Estimated Amt of Funds to be Expended this Year	Remaining Balance	Estimated Project Timeline		Comments	
					Source	Amount				Start Date	Completion Date		
		Conference Center Magnetic Door Holders YR25	Building 22 - Conference Center Magnetic Door Holders	\$54,165	CITF	\$54,165	\$13,280	\$0	\$40,885	7/1/2024	6/30/2026	Design phase is currently in progress.	
		Pool Filtration Installation YR25	Building 73 - Pool Filtration Installation	\$157,000	CITF	\$157,000	\$157,000	\$0	\$0	7/1/2024	6/30/2025	Project is complete.	
		Pool Filtration Installation YR25	Building 73 - Pool Filtration Installation	\$107,173	Green Fee	\$107,173	\$107,173	\$0	\$0	7/1/2024	6/30/2025	Project is complete.	
		Softball Field Lights YR25	Softball Lights - Softball Field (area E15)	\$487,000	CITF	\$487,000	\$48,716	\$0	\$438,284	7/1/2024	6/30/2026	Project equipment purchases in progress.	
		Softball Field Lights YR25	Softball Lights - Softball Field (area E15)	\$155,770	Auxiliary (Administrative Funds Allocations)	\$155,770	\$0	\$0	\$155,770	7/1/2024	6/30/2026	Additional Auxiliary funding for the Softball Field Lights project. Project equipment purchases in progress.	
		HLS Facility Sound System YR25	Building 72 - HLS Facility Sound System	\$213,900	CITF	\$213,900	\$82,224	\$0	\$131,676	7/1/2024	6/30/2026	Project equipment purchases in progress.	
				Subtotal - State Appropriated Projects:		\$51,542,612	\$8,279,667	\$0	\$43,262,945				
	Non-Appropriated Projects ^{5,6}												

Notes:

- 1) *Education & General (E&G) Operating Projects* is a consolidated line item of all FCO projects, as defined in Board reg 14.001, funded from current year E&G operating funds. No individual project funded in whole or in part shall exceed \$1M, per Board reg 9.007(3)(a)1.
- 2) *Carryforward (CF) - Small Projects* is a consolidated line item of all FCO projects with a cost up to \$2M funded in whole or in part from CF funds, pursuant to Board Reg. 14.003(2)(b). Includes replacement of facilities less than 10,000 gross sf. This is a single line item in the FCO budget. For a list of individual projects, refer to the Carryforward Spending Plans (CFSP).
- 3) *Carryforward (CF) - Large Projects* includes any FCO project funded in whole or in part from CF funds, where total individual FCO project cost exceeds \$2M, pursuant to Board reg. 14.003(2)(c) and expenditure limits described therein. May also be reflected as one of multiple funding sources under categories State Appropriate Projects and Non-Appropriated Projects.
- 4) *State Appropriated Projects* - this category includes all FCO projects utilizing funds originally appropriated as FCO funds by the State of Florida, notwithstanding criteria in Board regulation 14.001. These funds should never be included in the operating budget. Examples, PECO (including Sum-of-Digits) and CITF. Reference Board reg 14.003(12)(d). For the purpose herein, all projects \$2 million or less can be consolidated into a single line item.
- 5) *Non-Appropriated Projects* - this category includes all university FCO projects that have not directly or indirectly used funds appropriated by the State. Examples include private donations, athletic revenues, federal grants, housing/parking revenue bonds, etc. Reference Board reg 14.003(2)(e). For the purpose herein, all projects \$2 million or less can be consolidated into a single line item.

- 6) In light of the definition of "board" (s. 1013.01, F.S.), the requirements of s. 1031.61, F.S., the FCO Budget does not apply to those projects acquired, constructed, and owned by a Direct Support Organization or under a Public Private Partnership.
- 7) Athletics Funding Source (Athletics Administrative Funds from Earnings).
- 8) Auxiliary Administrative Funding Source (combination of Auxiliary Administrative Overhead, PCard Rebate, and Auxiliary Interest Earnings).

9.007 State University Operating Budgets and Requests

(1) Each university president shall prepare an operating budget, including an Education & General (E&G) Carryforward Spending Plan, for approval by the university board of trustees in accordance with instructions, guidelines and standard formats provided by the Board of Governors.

(2) Each university board of trustees shall adopt an operating budget, including an E&G Carryforward Spending Plan, for the general operation of the university as prescribed by the regulations of the Board of Governors. The university board of trustees-ratified operating budget and E&G Carryforward Spending Plan must be presented to the Board of Governors for approval by a date established by the Chancellor. Each university president shall implement the operating budget and E&G Carryforward Spending Plan of the university as prescribed by Florida Statutes, regulations of the Board of Governors, policies of the university board of trustees, provisions of the General Appropriations Act, and data reflected within the State University System Allocation Summary and Workpapers publication.

(3) The operating budgets of each state university shall consist of the following budget entities:

- (a) Education and General (E&G)– reports actual and estimated fiscal year operating revenues and expenditures for all E&G funds, including: General Revenue, Student and Other Fees Trust Fund, Educational Enhancement Trust Fund (Lottery), and the Phosphate Research Trust Fund. In addition, expenditures from university E&G carryforward funds (unexpended balances from all prior-period E&G appropriations) shall be included in the actual history fiscal year reporting. University budgeted E&G carryforward funds shall be reported in the E&G Carryforward Spending Plan Report.
 1. Otherwise by law, E&G funds are to be used for E&G activities only, such as, but not limited to, general instruction, research, public service, plant operations and maintenance as defined in Board of Governors guidelines, furniture, fixtures, and equipment, student services, libraries, administrative support, minor capital projects not to exceed \$1 million per individual project, and other enrollment-related and stand-alone operations of the universities.
 2. Universities shall accumulate ending E&G fund balances for activities such as those outlined in paragraph (3)(a)(4)4. If at any time, the unencumbered available balance in the E&G fund of the university board of trustees approved operating budget falls below seven (7) percent of the approved total, the university shall provide a written

notification and plan to the Board of Governors to attain a seven (7) percent balance of state operating funds within the next fiscal year.

3. Each university that retains a state operating fund carryforward balance in excess of the seven (7) percent minimum shall submit an E&G Carryforward Spending Plan for its excess carryforward balance. The Carryforward Spending Plan shall be submitted to the university's board of trustees for review, approval, or if necessary, amendment by September 30, 2020, and each September 30 thereafter. The Board of Governors shall review, approve, and amend, if necessary, each university's E&G Carryforward Spending Plan by November 15, 2020, and each November 15 thereafter.
4. A university's E&G Carryforward Spending Plan shall include the estimated cost per planned expenditure and a projected timeline for completion of the expenditure. Authorized expenditures in an E&G Carryforward Spending Plan may include:
 - a. Commitment of funds to a public education capital outlay project for which an appropriation has previously been provided that requires additional funds for completion and which is included in the list required by section 1001.706(12)(d), Florida Statutes;
 - b. Completion of a renovation, repair, or maintenance project (as defined in Board Regulation 14.001) that is consistent with section 1013.64(1), Florida Statutes, or replacement of a minor facility;
 - c. Completion of a remodeling or infrastructure project (as defined in Board Regulation 14.001), including a project for a developmental research school, if such project is survey recommended pursuant to section 1013.31, Florida Statutes;
 - d. Completion of a repair or replacement project necessary due to damage caused by a natural disaster for buildings included in the inventory required pursuant to section 1013.31, Florida Statutes;
 - e. Operating expenditures that support the university's mission;
 - f. Any purpose specified by the university board of trustees, including funding dedicated to maintenance reserve escrow accounts pursuant to Board Regulation 14.002 and Section 1001.706(12)(c)1., Florida Statutes, or in the General Appropriations Act; and
 - g. A commitment of funds to a contingency reserve for expenses incurred as a result of a state of emergency declared by the Governor pursuant to s. 252.36, Florida Statutes.
5. Annually, by September 30, the chief financial officer of each university shall certify the unexpended amount of funds appropriated to the university from the General Revenue Fund, the Educational Enhancement Trust Fund, and the Student and Other Fees Trust Fund as of June 30 of the previous fiscal year.

6. A University may spend the minimum carryforward balance of seven (7) percent if a demonstrated emergency exists and the plan is approved by the university's board of trustees and the Board of Governors.
 7. Expenditures from any source of funds by any university shall not exceed the funds available. No expenditure of funds, contract, or agreement of any nature shall be made that requires additional appropriation of state funds by the Legislature unless specifically authorized in advance by law or the General Appropriations Act.
 8. The following units are required to report under this budget entity:
 - State Universities
 - UF - Institute of Food and Agricultural Sciences
 - UF Health Science Center
 - USF Medical Center
 - FSU Medical School
 - UCF Medical School
 - FIU Medical School
 - FAU Medical School
 - FAMU-FSU College of Engineering
 - Florida Postsecondary Comprehensive Transition Program (UCF)
 - Enterprise Cybersecurity Resiliency (USF)
 - Community School Grant Program (UCF)
- (b) Contracts and Grants – reports actual and estimated year revenues, expenditures, and positions for university functions which are supported by foundations, various state and federal agencies, local units of governments, businesses, and industries. Universities shall comply with all applicable federal, state, local, and university regulations and guidelines as they relate to grants, contracts, and sponsored research programs.
- (c) Auxiliary Enterprises – reports actual and estimated year revenues, expenditures, and positions for self-supporting functions such as, but not limited to, parking services, housing, bookstore operations, and food services.
- (d) Local Funds – reports actual and estimated year revenues, expenditures, and positions for the following specific areas:
1. Student Activities – revenues generated primarily from the activity and service fee each university is authorized to charge its students as a component of the mandatory fee schedule. Activities commonly supported by these revenues include student government, cultural events, student organizations, and intramural/club events.

2. Intercollegiate Athletics – revenues generated from the student athletic fee that each university is authorized to collect as a component of the mandatory fee schedule, and from other sources including ticket sales, radio/TV, bowl games, and tournament revenues.
 3. Concession Fund – revenues generated from various vending activities located around the campuses. The university's budget must reflect the various departments/activities on each campus which benefit from receipt of these funds.
 4. Student Financial Aid – revenues received by the university for loans, grants, scholarships, and other student financial aid. Expenditures of these funds must be reported by activities such as externally-funded loans, student scholarships, need-based financial aid, academic-based financial aid, and athletic grants/scholarships.
 5. Technology Fee – revenues generated from the technology fee that a university is authorized to charge its students as a component of the mandatory fee schedule. Proceeds from this fee shall be used to enhance instructional technology resources for students and faculty.
 6. Board-Approved Fees – student fees presented to the Board of Governors for approval by a university board of trustees that are intended to address a student need not currently being met through existing university services, operations, or another fee.
 7. Self-Insurance Programs – revenues received by the university from entities and individuals protected by the self-insurance programs. This budget must reflect expenditures related to the administration of the self-insurance programs and the judgments or claims arising out of activities for which the self-insurance program was created.
- (e) Faculty Practice Plan – related to the activities for the state universities' medical schools and health centers. This budget must be designed to report the monetary level of clinical activity regarding the training of students, post-graduate health professionals, and medical faculty.
- (4) The operating budgets of each university shall represent the following:
- (a) The university's plan for utilizing the resources available through direct or continuing appropriations by the Legislature, allocation amendments, or from local sources including student tuition and fees. The provisions of the General Appropriations Act and the State University System Allocation Summary and Workpapers publication will be taken into consideration in the development and preparation of the E&G data.
 - (b) Actual prior-year revenues, expenditures (including E&G carryforward amounts expended), and positions, as well as current-year estimated revenues, expenditures, and positions. University E&G carryforward funds shall be budgeted in the E&G Carryforward Spending Plan.

- (c) Assurance that the universities are in compliance with general legislative intent for expenditure of the appropriated state funds and with the Board of Governors' regulations, guidelines and priorities for all funding sources.

(5) Any earnings (interest, investment, or other) resulting from the investment of current-year E&G appropriations are considered to be of the same nature as the original appropriations and are subject to the same expenditure regulations as the original appropriations. E&G earnings are not to be utilized for non-E&G related activities or for fixed capital outlay activities except as provided by law. Earnings resulting from invested E&G carryforward funds are considered to be additions to the university's E&G carryforward balance and shall be expended in accordance with section (3)(a) of this regulation.

Anticipated earnings for the estimated year from invested E&G funds should not be included when building the detailed operating budget schedules. Estimated-year E&G earnings and planned expenditures of these funds should only be reported on the manually-prepared E&G Schedule I and Summary Schedule I reports.

(6) Any unexpended E&G appropriation carried forward to the fund balance in a new fiscal year shall be utilized in support of E&G activities only unless otherwise provided by law.

(7) Any amendments to the approved E&G Carryforward Spending Plan during the fiscal year shall be reported to the Board of Governors for a time period and in a format as prescribed by the Chancellor. The approved or amended E&G Carryforward Spending Plan should be used to track actual E&G Carryforward expenditures during the fiscal year to ensure compliance with the spending plan.

(8) Each university board of trustees may submit to the Chancellor's Office annually a Legislative Budget Request for operations. Such requests shall be made in accordance with the fiscal policy guidelines, formats, instructions, and schedule provided by the Chancellor.

Authority: Section 7(d), Art. IX, Fla. Const., History: New 12-6-07, Amended 11-21-13, 9-22-16, 10-30-19, 9-16-20, 8-26-22, 5-10-23, 9-8-23

14.003 Fixed Capital Outlay Projects – University Budgeting Procedures

(1) Each university will prepare an annual Fixed Capital Outlay (FCO) Budget, in accordance with the instructions, guidelines, and standard formats provided by the Chancellor. The FCO Budget must be approved by the university board of trustees and the Board of Governors. Such approval remains in effect for the life of the FCO Projects. The annual FCO Budget must include all FCO Projects, including previously approved projects that have not yet been completed.

(2) FCO Projects shall be listed by category or categories in the University FCO Budget as follows:

FCO Budget Categories

a. Education & General (E&G) Operating Projects – This category is consolidated and includes all FCO Projects funded from current year E&G operating funds. No individual project in this category, funded in whole or in part with E&G operating funds, shall exceed \$1 million, pursuant to Board Regulation 9.007(3)(a)1.

Boards of Trustees may adopt policies requiring more detailed line-item budgeting at the local level.

b. Carryforward (CF) - Small Projects – This category is consolidated and includes all FCO Projects with a total per-project cost up to \$2 million, funded in whole or in part from CF funds. Allowable uses include maintenance, repair, renovation, remodeling, demolition of existing educational facilities and existing general site improvements (E&G campus real property improvements), and replacement of a Minor Facility. This category is budgeted as a single line in the FCO Budget. This may also be reflected as one of multiple funding sources under categories State Appropriated Projects and Non-Appropriated Projects.

c. Carryforward (CF) – Large Projects – This category includes FCO Projects funded in whole or in part from CF funds, where the total project cost is greater than \$2 million. This may also be reflected as one of multiple funding sources under categories State Appropriated Projects and Non-Appropriated Projects. Allowable uses include the following:

- i. Completion of a Public Education Capital Outlay Project that has received a state appropriation and is included on the Board's incomplete project list maintained pursuant to s. 1001.706(12)(d), F.S.
- ii. A renovation, repair, or maintenance project consistent with s. 1013.64(1), F.S. and replacement of a Minor Facility.
- iii. A remodeling or infrastructure project, including a project for a developmental research school, if such project is recommended

in the latest educational plant survey.

- iv. Repair or replacement of Education & General Facilities necessary due to damage caused by a natural disaster.

d. State Appropriated Projects – This category includes all FCO Projects using funds originally appropriated as FCO funds by the State of Florida, notwithstanding the criteria provided in Board Regulation 14.001. These funds should never be included in the university operating budget. Examples include PECO and Capital Improvement Trust Fund (CITF).

e. Non-Appropriated Projects – This category includes all FCO Projects that have not directly or indirectly used funds appropriated by the State. Examples of such funding sources would include housing revenue bonds, parking revenue bonds, private donations, federal grants, insurance proceeds, and athletic revenues.

(3) For the purpose of this regulation, FCO Projects do not apply to those projects acquired, constructed, and owned by a Direct Support Organization or under a Public Private Partnership; the requirements for those projects are addressed in either the Debt Management Guidelines or the Public Private Partnership Guidelines.

(4) The FCO Budget may be amended, subject to use of only the categories authorized in section (2), as follows:

a. E&G Operating Projects - must be approved by the board of trustees or designee.

b. CF Small Projects – Individual new projects up to \$2 million, as well as increases up to \$2 million on individual existing projects, must be approved by the board of trustees or designee.

c. CF Large Projects, State Appropriated Projects, and Non-Appropriated Projects – Individual new projects greater than \$5 million added to the FCO Budget, as well as increases greater than \$5 million to individual existing projects, require Board of Trustees and Board of Governors' approval.

(5) FCO Project spending may be reported annually at the end of the fiscal year at the project detail level, in a format specified by the Chancellor.

**Board of Trustees
Board Meeting
September 18, 2025**

Approval of FY 2025-26 Carryforward Spending Plan, Fixed Capital Outlay Plan, and Delegated Authority for Budget Adjustments

Recommended Action:

1. Approve the Estimated Fiscal Year 2025-26 University Carryforward Spending Plan; the Estimated Fiscal Year 2025-26 University Fixed Capital Outlay Plan; and the Certification Document for University Fixed Capital Outlay, Operating, and Carryforward Budgets.
2. Authorize the Interim President to serve as the Board of Trustees's designee to approve future adjustments to the Carryforward Spending Plan and/or the Fixed Capital Outlay (FCO) Plan as institutional needs warrant, up to \$1,000,000 per E&G funded single adjustment item and up to \$2,000,000 per Carryforward funded single adjustment item, and report the changes back to the Board of Trustees.
3. Authorize the Board of Trustees Chair, the Interim President and the Chief Financial Officer (CFO) to sign the Operating Budget, Carryforward Budget and Fixed Capital Outlay Budget Certification.

Background Information:

Florida Statute 1011.45(2), *End of Year Balance of Funds*, requires any university with a state operating fund carryforward balance above the 7% minimum to submit a Carryforward Spending Plan to the Board of Governors (BOG). This plan must be approved by the university's Board of Trustees (BOT) by September 30. Additionally, BOG Regulation 14.003, *Fixed Capital Outlay Projects-University Budgeting Procedures*, requires each university to submit an annual Fixed Capital Outlay (FCO) budget approved by its BOT. These submissions follow the guidelines outlined in BOG Regulations 9.007 (Operating Budgets) and 14.003 (FCO).

The University of West Florida's FY 2025–26 Consolidated Preliminary Operating Budget was due to the BOG on June 25, 2025, and was approved by the UWF BOT on June 12, 2025. The BOG Certification Form requires signatures from the BOT Chair, the University President, and the Chief Financial Officer affirming that the UWF Operating Budget, Carryforward Spending Plan, and FCO Budget are materially correct and that funds will only be expended in accordance with approved budgets, statutes, BOG regulations, and UWF regulations.

UWF now seeks BOT authorization for the Interim President to act as the Board's designee to approve future adjustments to the Carryforward Spending Plan and FCO Budget, as needed, within the following thresholds:

- Up to \$1,000,000 per E&G-funded single adjustment item
- Up to \$2,000,000 per Carryforward-funded single adjustment item

This delegation of authority, consistent with BOG Regulation 14.003, FCO, will prevent delays in FCO projects between scheduled BOT meetings. All adjustments approved by the Interim President within these thresholds will be reported at the next scheduled meeting of the Finance, Facilities, and Operations Committee. Any changes exceeding these thresholds will be submitted for BOT approval.

Implementation Plan:

Once approved by the BOT, the university would implement spending according to the strategic priorities of the BOT. Follow-up reporting would be made to the BOT and the Board of Governors.

Fiscal Implications:

The FY25-26 Carryforward Spending Plan reflects a total balance of **\$60.4M**, which includes the required **7% reserve (\$12.7M)** and **current encumbrances (\$5.0M)**, leaving **\$42.7M** available for planned expenditures. The FY25-26 Fixed Capital Outlay Budget totals **\$159.8M**.

Relevant Authority:

Florida Statute 1011.45(2), End of Year Balance of Funds
BOG Regulation 14.003, Fixed Capital Outlay Projects-University Budgeting Procedures

Supports Strategic Direction(s):

Strategic Direction 5: Infrastructure and Strategic Direction 6: Operational Excellence

Supporting Documents:

1. Estimated FY25-26 CF & FCO Budgets Power Point (3 pages)
2. Estimated FY25-26 University Carryforward Spending Plan (7 pages)
3. Estimated FY25-26 University Fixed Capital Outlay Plan (4 pages)
4. Certification Document for University Fixed Capital, Operating and Carryforward Budget (1 page)
5. BOG Regulation 14.003, Fixed Capital Outlay Projects-University Budgeting Procedures
6. Florida Statute 1011.45(2), End of Year Balance of Funds

Prepared by:

- Jeffrey A. Djerlek, Senior Associate Vice President for Finance and University Controller
- Sharon Jordan, Associate Controller of Reporting
- Desmond Peters, Academic Affairs Associate Director of Budgets
- Janet Davis, President's Division Business Manager
- Angela Wallace, Finance & Administration Director of Budgets
- Daniel Lucas, Associate Vice President of Advancement
- Pamela Cadem, Director of Budgets, DAESA
- Sarah Bloxson, Coordinator I

Presenter:

Jeffrey A. Djerlek, Senior Associate Vice President for Finance and University Controller

Carryforward

- Total Cash & Investments of carryforward started at **\$60.4M**
 - **\$5.0M** in encumbrances
 - **\$12.8M** is the 7% of E&G required reserve
 - **\$5.1M** is the new required 12% of carryforward set aside for PECO projects & deferred maintenance
 - **\$3.2M** for B129 Science & Engineering
 - **\$1M** for HVAC controllers
 - **\$918K** in repair and replacements
- Leaving **\$37.4M** to be detailed in the carryforward plan
 - There are **\$19.5M** in restricted projects
 - Another **\$17.9M** in committed projects

FY25-26 Carryforward & Fixed Capital Outlay Budgets (cont.)

\$19.5M in Restricted Projects

- **\$11.2M** for faculty recruitment and retention to be spent over 3 years
- **\$4M** in recurring financial aid packaging and another **\$2M** in aid for the fall

\$17.9M in Committed Projects

- **\$3.5M** for nursing scholarships over 3 years
 - **\$3.3M** for faculty technology and startup funds
 - **\$2.5M** for ITS equipment and servers
 - **\$1M** for lab renovations
 - **\$1M** for President's Division space configuration and initiatives
-

FY25-26 Carryforward & Fixed Capital Outlay Budgets (cont.)

\$159.8M Fixed Capital Outlay Budget

- **\$45M** for the new Stadium
- **\$39.3M** for Building 129 Science & Engineering Research Facility-**TRIUMPH (\$15M)**
- **\$20M** for the Satellite Utilities Plan Phase I
- **\$19.5M** in deferred maintenance projects, which includes **\$15M** of the SFRF
- **\$7.7M** for Building 234 Athletic Training Center, finalizing punch list
- **\$6.3M** for Building 54 Field House Fire Mitigation, finalizing punch list
- **\$5.1M** in Roof Replacements for 9 buildings, which also utilizes the SFRF
- **\$2.6M** in Carryforward dollars on Phase 1B of the Grand Entrance and Community Garden
- **\$2.3M** in HVAC system upgrades
- **\$2.0M** Next Gen Innovators with NWFSC
- **\$1.4M** in Building 37 Nursing & Resp Therapy configurations

UNIVERSITY OF WEST FLORIDA
Education and General
2025-2026 Carryforward Spending Plan Summary
Approved by University Board of Trustees
Balances and Spending Plans as of July 1, 2025

	University E&G	Special Unit or Campus (Title)	Grand Total : University Summary	100 President's	214 Advancement	235 Fin & Admin	475 Student Affs	500 Academic Affs	969-ITS Central	S010 Central	969-No IT or S Central	969 Central
A. Beginning E&G Carryforward Balance - July 1, 2025 :												
Cash	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Investments	\$ 60,377,924	\$ -	\$ 60,377,924	\$ 2,646,762	\$ 674,370	\$ 10,522,778	\$ 2,441,997	\$ 40,065,270	\$ 971,616	\$ (2,932,155)	\$ 5,983,754	\$ 4,023,215
Accounts Receivable	\$ 2,709	\$ -	\$ 2,709	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Less: Accounts Payable	\$ 6,241	\$ -	\$ 6,241	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Less: Deferred Student Tuition & Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
B. Beginning E&G Carryforward Balance (Net of Payables/Receivables/Deferred Fees)	\$ 60,374,392	\$ -	\$ 60,374,392	\$ 2,646,762	\$ 674,370	\$ 10,522,778	\$ 2,441,997	\$ 40,065,270	\$ 971,616	\$ (2,932,155)	\$ 5,983,754	\$ 4,023,215
C. Fiscal Year 2024-2025 E&G Carryforward Encumbrances Brought Forward:	\$ 4,964,800	\$ -	\$ 4,964,800	\$ 14,328	\$ -	\$ 3,829,035	\$ 105,298	\$ 201,194	\$ 176,786	\$ -	\$ 638,159	\$ 814,945
D. Annual Contribution to Reserves for New FCO Projects (per s. 1001.706(12), F.S., and Board Reg 14.002) (Should agree with the "Total Facilities Reserves as of July 1, 2025" on the "Details - FCO Reserves" tab)	\$ 75,909	\$ -	\$ 75,909	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 75,909	\$ 75,909
E. 7% Statutory Reserve Requirement (per s. 1011.45(1), F.S.)	\$ 12,752,579	\$ -	\$ 12,752,579	\$ 250,000	\$ 453,631	\$ 989,894	\$ 375,763	\$ 8,571,790	\$ -	\$ (2,932,155)	\$ 5,043,656	\$ 2,111,501
F. E&G Carryforward Balance Less 7% Statutory Reserve Requirement (Amount Requiring Approved Spending Plan)	\$ 42,581,104	\$ -	\$ 42,581,104	\$ 2,382,434	\$ 220,739	\$ 5,703,849	\$ 1,960,936	\$ 31,292,286	\$ 794,830	\$ -	\$ 226,030	\$ 1,020,860
G. 12% Carryforward Funds towards Public Education Capital Outlay (PECO) projects or deferred building maintenance expenses (per s. 1011.45(3), F.S.)(Should agree with the "Total Amount Committed to PECO Projects or Deferred Maintenance of July 1, 2025" on the "Details-12% Commitment" tab)	\$ 5,118,842	\$ -	\$ 5,118,842	\$ -	\$ -	\$ 1,918,842	\$ -	\$ 3,200,000	\$ -	\$ -	\$ -	\$ -
H. Carryforward Reserve Fund (per s. 1011.45(3), F.S.)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
I. * Restricted / Contractual Obligations												
Restricted by Appropriations	\$ 1,242,498	\$ -	\$ 1,242,498	\$ 1,242,498	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
University Board of Trustees Reserve Requirement	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Restricted by Contractual Obligations												
Compliance, Audit, and Security												
Compliance Program Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Audit Program Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Campus Security and Safety Enhancements	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Academic and Student Affairs												
Student Services, Enrollment, and Retention Efforts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Student Financial Aid	\$ 6,107,109	\$ -	\$ 6,107,109	\$ -	\$ -	\$ -	\$ -	\$ 6,107,109	\$ -	\$ -	\$ -	\$ -
Faculty/Staff, Instructional and Advising Support and Start-up Funding	\$ 11,221,883	\$ -	\$ 11,221,883	\$ -	\$ -	\$ -	\$ -	\$ 11,221,883	\$ -	\$ -	\$ -	\$ -
Faculty Research and Public Service Support and Start-Up Funding	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Library Resources	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Facilities, Infrastructure, and Information Technology												
Utilities	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Information Technology (ERP, Equipment, etc.)	\$ 94,085	\$ -	\$ 94,085	\$ -	\$ -	\$ -	\$ -	\$ 94,085	\$ -	\$ -	\$ -	\$ -
Small Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))	\$ 315,647	\$ -	\$ 315,647	\$ -	\$ -	\$ 315,647	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Large Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other UBOT Approved Operating Requirements												
Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	\$ 537,599	\$ -	\$ 537,599	\$ -	\$ -	\$ 537,599	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Contingencies for a State of Emergency Declared by the Governor (Section 1011.45(3)(g))	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operating Restricted (Should agree with restricted column totals on "Details-Operating" tab)	\$ 19,203,174	\$ -	\$ 19,203,174	\$ 1,242,498	\$ -	\$ 537,599	\$ -	\$ 17,423,077	\$ -	\$ -	\$ -	\$ -
FCO Restricted (Should agree with restricted column totals on "Details-Fixed Capital Outlay" tab)	\$ 315,647	\$ -	\$ 315,647	\$ -	\$ -	\$ 315,647	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -

UNIVERSITY OF WEST FLORIDA
Education and General
2025-2026 Carryforward Spending Plan Summary
Approved by University Board of Trustees
Balances and Spending Plans as of July 1, 2025

			Special Unit or	Grand Total :	100	214	235	475	500	969-ITS	S010	969-No IT or S	969
			Campus (Title)	University Summary	President's	Advancement	Fin & Admin	Student Affs	Academic Affs	Central	Central	Central	Central
Grand Total Restricted / Contractual Funds					\$ 1,242,498	\$ -	\$ 853,246	\$ -	\$ 17,423,077	\$ -	\$ -	\$ -	\$ -
J. * Commitments													
Compliance, Audit, and Security													
Compliance Program Enhancements			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Audit Program Enhancements			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Campus Security and Safety Enhancements			\$ 60,971	\$ -	\$ 60,971	\$ -	\$ -	\$ 60,971	\$ -	\$ -	\$ -	\$ -	\$ -
Academic and Student Affairs													
Student Services, Enrollment, and Retention Efforts			\$ 2,021,675	\$ -	\$ 2,021,675	\$ -	\$ 220,739	\$ -	\$ 1,800,936	\$ -	\$ -	\$ -	\$ -
Student Financial Aid			\$ 3,686,314	\$ -	\$ 3,686,314	\$ -	\$ -	\$ 100,000	\$ 3,586,314	\$ -	\$ -	\$ -	\$ -
Faculty/Staff, Instructional and Advising Support and Start-up Funding			\$ 287,500	\$ -	\$ 287,500	\$ -	\$ -	\$ -	\$ 287,500	\$ -	\$ -	\$ -	\$ -
Faculty Research and Public Service Support and Start-Up Funding			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Library Resources			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Facilities, Infrastructure, and Information Technology													
Utilities			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Information Technology (ERP, Equipment, etc.)			\$ 4,320,128	\$ -	\$ 4,320,128	\$ -	\$ -	\$ 60,000	\$ 3,465,298	\$ 794,830	\$ -	\$ -	\$ 794,830
Small Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))			\$ 696,295	\$ -	\$ 696,295	\$ -	\$ 696,295	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Large Carryforward Fixed Capital Outlay Projects (Board of Governors Regulation 14.003(2))			\$ 525,562	\$ -	\$ 525,562	\$ -	\$ 525,562	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Other UBOT Approved Operating Requirements													
Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)			\$ 6,344,996	\$ -	\$ 6,344,996	\$ 1,139,936	\$ -	\$ 1,648,933	\$ 3,330,097	\$ -	\$ -	\$ 226,030	\$ 226,030
Contingencies for a State of Emergency Declared by the Governor (per s. 1011.45(3)(g), F.S.)			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
Operating Commitments (Should agree with committed column total on "Details-Operating" tab)			\$ 16,721,584	\$ -	\$ 16,721,584	\$ 1,139,936	\$ 220,739	\$ 1,709,904	\$ 1,960,936	\$ 10,669,209	\$ 794,830	\$ -	\$ 226,030
FCO Commitments (Should agree with committed column total on "Details-Fixed Capital Outlay" tab)			\$ 1,221,857	\$ -	\$ 1,221,857	\$ -	\$ -	\$ 1,221,857	\$ -	\$ -	\$ -	\$ -	\$ -
Grand Total Commitments			\$ 17,943,441	\$ -	\$ 17,943,441	\$ 1,139,936	\$ 220,739	\$ 2,931,761	\$ 1,960,936	\$ 10,669,209	\$ 794,830	\$ -	\$ 226,030
K. Available E&G Carryforward Balance as of July 1, 2025			\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ 0

* Provide supplemental, **detailed descriptions** for all multiple-item categories using the subsequent "Details" tabs in this file.

Notes :

1. Florida Polytechnic University amounts include the Phosphate Research Trust Fund.

2. **2024 House Bill 707 amended 1011.45 F.S.** regarding university Education & General carryforward minimum reserve balances, reporting requirements, and allowable uses. 1011.45(1) states that "Each university shall maintain a minimum carry forward balance in of at least 7 percent of its state operating budget; however, a university may retain and report to the Board of Governors an annual reserve balance exceeding that amount. The spending plan shall be submitted to the university's board of trustees for review, approval, or if necessary, amendment by September 1, 2020, and each September 1 board of trustees for review, approval, or if necessary, amendment by September 1, 2020, and each September 1 thereafter. The Board of Governors shall review, approve, and amend if necessary, each university's carry forward spending plan by October 1, 2020, and each October 1 thereafter." 1011.45(3) adds "A university's carry forward spending plan must include the estimated cost per planned expenditure and a timeline for completion of the expenditure." Three additional tabs are provided with this file to allow reporting of university detailed expenditure plans for each planned expenditure or project, a completion timeline, and amount budgeted for expenditure during the reporting fiscal year.

<div>UNIVERSITY OF WEST FLORIDA</div> <div>2025-2026 University E&G Carryforward Spending Plans - Supplemental Details (Operating Plans)</div> <div>Pursuant to 1011.45, Florida Statutes</div> <div>July 1, 2025</div>											
Line Item #	Division	Carryforward Spending Plan Category	Specific Expenditure/Project Title	Budget				Project Timeline			Comments/Explanations
				Total Amount to be Funded from Current Year E&G Carryforward Balance	RESTRICTED Restricted Balance as of July 1, 2025	COMMITTED Committed Balance as of July 1, 2025	E&G Carryforward Amount Budgeted for Expenditure During FY26	Total # Years of Expenditure per Project	Current Expenditure Year #	Estimated Completion Date (Fiscal Year)	
1	100	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	President's Office	\$ 1,139,936		\$ 1,139,936	\$ 1,139,936	1	1	2026	New President Lead Initiatives: time-specific employment, leave payouts, 3rd party contracts and consultants, space and furniture configuration and professional development.
2	100	Restricted by Appropriations	Small Business Development Center (SBDC)	\$ 1,242,498	\$ 1,242,498		\$ 1,242,498	1	1	2026	Conference registrations and travel; Small Business Success Summit; SBDC Network PD conference; Professional development for State Office Personnel
3	214	Student Services, Enrollment, and Retention Efforts	Div. of Advancement Student and OPS, Equipment & Materials	\$ 220,739		\$ 220,739	\$ 110,370	2	1	2027	Division of Advancement-Student and staff OPS, Phonathon students, equipment, services, materials, software, travel, conferences, marketing, advertising, media, branding, leave payouts as needed.
4	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Finance and Admin Division -Equipment and Supplies	\$ 197,016	\$ 1,766	\$ 195,250	\$ 197,016	1	1	2026	Equipment and supplies purchases for the division and for maintaining campus facilities (facility maintenance, utility operations, etc.).
5	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Finance and Admin Division-Repairs and Maintenance	\$ 35,000	\$ 35,000	\$ -	\$ 35,000	1	1	2026	Irrigation systems repairs, boilers service/repairs, etc.
6	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Deferred Maintenance Projects	\$ 464,687	\$ 54,264	\$ 410,423	\$ 464,687	2	2	2026	Maintenance and repair projects in progress (e.g., HVAC repairs, etc.).
7	235	Campus Security and Safety Enhancements	University Police Vehicle Replacements; Asbestos Surveys; AEDs	\$ 60,971	\$ -	\$ 60,971	\$ 60,971	3	3	2026	Purchase of new vehicles and vehicles equipment for University Police, asbestos surveys for campus buildings, AEDs purchases, etc.
8	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Finance and Admin Division-Contractual Services	\$ -	\$ -	\$ -	\$ -	1	1	2026	Fire suppression inspections, mapping campus potable water system, etc.
9	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Facilities Management-Furniture (Expense)	\$ -	\$ -	\$ -	\$ -	1	1	2026	Replace chalkboards with whiteboards in campus classrooms.
10	235	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Lab Renovations (B58 & B72)	\$ 1,489,829	\$ 446,569	\$ 1,043,260	\$ 1,489,829	2	2	2026	Research labs renovations projects planned for Biology and Chemistry.
11	475	Student Financial Aid	DoS Emergency Scholarships	\$ 30,000		\$ 30,000	\$ 30,000	1	1	2026	Emergency Scholarships for Dean of Students to assist students in emergency situations.
12	475	Student Services, Enrollment, and Retention Efforts	Housing Replacement of Narcan	\$ 20,314		\$ 20,314	\$ 6,771	3	1	2028	Balance of Opioid Trust distribution in 2025 to be used for replacement costs of Narcan in HRL Buildings
13	475	Student Services, Enrollment, and Retention Efforts	Disabled Aid Assistance	\$ 53,081		\$ 53,081	\$ 53,081	1	1	2026	Direct Support for Disabled Students if the need is more than the E&G budget can cover in order to meet divisional & university wide missions.
14	475	Student Services, Enrollment, and Retention Efforts	Divisional OPS Needs	\$ 200,000		\$ 200,000	\$ 200,000	1	1	2026	OPS reserve for division wide use in case the need is more than the E&G budgets can cover in order to meet divisional & university wide missions
15	475	Student Services, Enrollment, and Retention Efforts	Divisional Contract & Service Needs	\$ 150,000		\$ 150,000	\$ 150,000	1	1	2026	Service & Contract reserves for division wide use to meet divisional and university wide missions.
16	475	Student Financial Aid	DAESA Scholarships	\$ 70,000		\$ 70,000	\$ 70,000				Scholarship reserves for division wide use to meet divisional & university missions
17	475	Student Services, Enrollment, and Retention Efforts	Divisional Furniture, Equipment, and Maintenance Needs	\$ 241,815		\$ 241,815	\$ 241,815	1	1	2026	Furn/Equip/Maint for anticipated upgrades to some departments and unexpected needs in order to meet divisional & university wide missions.
18	475	Student Services, Enrollment, and Retention Efforts	Divisional Misc Expenditure Needs	\$ 99,961		\$ 99,961	\$ 99,961	1	1	2026	Misc EXP reserves for unexpected cost that may occur in order to meet divisional & university wide missions.
19	475	Student Services, Enrollment, and Retention Efforts	Leave Liability, Unemployment, OPS Health insurance, Bonuses, etc	\$ 573,049		\$ 573,049	\$ 573,049	1	1	2026	Used for OPS Health, unemployment, Bonuses, Quality Enhancement (QEP/HIP), and other unexpected needs of the division
20	475	Student Services, Enrollment, and Retention Efforts	Non recurring salary & fringe	\$ 454,604		\$ 454,604	\$ 454,604	1	1	2026	Temp/Term pay reserves for division wide non-recurring salary & fringe & leave payouts.
21	475	Information Technology (ERP, Equipment, etc.)	ITS Equipment Replacement	\$ 60,000		\$ 60,000	\$ 60,000				Technology Replacement cycle is used to replace desktop/laptops on a 5 year cycle.
22	475	Student Services, Enrollment, and Retention Efforts	International Recruitment-3rd party payments	\$ 8,112	3-Details-Operating	\$ 8,112	\$ 8,112	1	1	2026	3rd party recruiter payments

Line Item #	Division	Carryforward Spending Plan Category	Specific Expenditure/Project Title	Total Amount to be Funded from Current Year E&G Carryforward Balance	RESTRICTED	COMMITTED	E&G Carryforward Amount Budgeted for Expenditure During FY26	Total # Years of Expenditure per Project	Current Expenditure Year #	Estimated Completion Date (Fiscal Year)	Comments/Explanations
					Restricted Balance as of July 1, 2025	Committed Balance as of July 1, 2025					
23	500	Student Financial Aid	Academic Affairs Scholarships	\$ 2,000,000	\$ 2,000,000		\$ 2,000,000	1	1	2026	Academic Scholarships and student financial aid
24	500	Student Financial Aid	Academic Affairs Scholarships Packaging for Next Term	\$ 4,000,000	\$ 4,000,000		\$ 1,000,000	4	1	2029	Packaging amounts for the next fall and spring scholarships awards. Amounts must be set aside in advance in order to send new students awards notifications.
25	500	Faculty/Staff, Instructional and Advising Support and Start-up Funding	Academic Affairs Temporary employees compensation	\$ 287,500		\$ 287,500	\$ 287,500	1	1	2026	Salaries for temporary employees
26	500	Information Technology (ERP, Equipment, etc.)	Information technology, network infrastructure, software, equipment and other mission critical needs	\$ 2,532,603		\$ 2,532,603	\$ 2,532,603	1	1	2026	Funding for Information technology, network infrastructure, software, equipment and other mission critical needs
27	500	Faculty/Staff, Instructional and Advising Support and Start-up Funding	Strategic Initiatives, Academic Program Investments - restricted for faculty recruitment and retention	\$ 9,353,779	\$ 9,353,779		\$ 3,117,926	3	1	2028	Faculty Retention & Recruitment funds to be sent over three years - restricted
28	500	Faculty/Staff, Instructional and Advising Support and Start-up Funding	Strategic Initiatives, Academic Program Investments - restricted for faculty recruitment and retention	\$ 1,868,104	\$ 1,868,104		\$ 934,052	2	1	2027	Faculty Retention & Recruitment funds to be sent over two years - restricted
29	500	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Strategic Initiatives, Academic Program Investments.	\$ 3,330,097		\$ 3,330,097	\$ 3,330,097	1	1	2026	Funding for academic programs with costly replacement technology, and new academic program analysis and development to keep in line the strategic enrollment initiative of the University's Strategic Master Plan
30	500	Information Technology (ERP, Equipment, etc.)	Information technology core systems equipment, support and personnel training	\$ 1,026,780	\$ 94,085	\$ 932,695	\$ 1,026,780	1	1	2026	Funding for University technology initiatives - Google Workspace, Oracle Maintenance, Network support and equipment and employee training.
31	500	Student Financial Aid	Nursing Scholarships	\$ 45,639		\$ 45,639	\$ 45,639				Nursing LINE scholarships Santa Rosa Medical Center, Baptist Hospital and Ascension
32	500	Student Financial Aid	Nursing Scholarships	\$ 3,647,784	\$ 107,109	\$ 3,540,675	\$ 1,215,928	3	1	2028	Nursing scholarships to be awarded over the course of three - four years
33	969-9703	Information Technology (ERP, Equipment, etc.)	Oracle On-line Temp Licenses	\$ 1,601		\$ 1,601	\$ 1,601	1	1	2026	Oracle Licenses for FY26 and additional temp licenses
34	969-9711	Information Technology (ERP, Equipment, etc.)	ERP Training & Banner Student costs	\$ 683,586		\$ 683,586	\$ 683,586	1	1	2026	Funding for ERP training, consultation and other services; Banner Student software maintenance and licenses to run processes
35	969-9804	Information Technology (ERP, Equipment, etc.)	Server Equipment Replacement & Licenses	\$ 93,070		\$ 93,070	\$ 93,070	1	1	2026	Funding for infrastructure equipment & software licenses
36	969-9879	Information Technology (ERP, Equipment, etc.)	Security Items/University Academic Software Licenses	\$ 16,573		\$ 16,573	\$ 16,573	1	1	2026	Security Awareness Training for new Staff and security software licenses
37	969	Other Operating Requirements (University Board of Trustees-Approved That Support the University Mission)	Deferred Maintenance Projects	\$ 226,030		\$ 226,030	\$ 226,030	2	2	2026	Maintenance and repair projects.
38				\$ -			\$ -				
39				\$ -			\$ -				
40				\$ -			\$ -				
Total as of July 1, 2025: *				\$ 35,924,758	\$ 19,203,174	\$ 16,721,584	\$ 23,199,085				

*Note: Should agree with respective restricted/contractual and/or committed category totals on "Summary" tab.

UNIVERSITY OF WEST FLORIDA

2025-2026 University E&G Carryforward Spending Plans - Supplemental Details (Fixed Capital Outlay Project Plans)

Pursuant to Section 1011.45, Florida Statutes

July 1, 2025

Line Item #	Carryforward Spending Plan Category	Specific Project Title/Name	Project Description	Amount of July 1, 2025, E&G Carryforward Operating Balance Provided to FCO	(F)	Restricted	(G)	Carryforward Expenditure Timeline			Comments/Explanations	
						To Restricted Balance on July 1, 2025	To Committed Balance on July 1, 2025	Total # Years of Expenditures per Project	Current Expenditure Year #	Estimated Completion Date (Fiscal Year)		
Small Carryforward Projects ¹												
1	Small, < \$2M: Renovation, Repair or Maintenance	Community Garden	Community Garden-Wooden Boardwalk	\$ 315,647	\$	315,647	\$	-	2	2	2026	New project started in FY 2024-25 with Auxiliary funding. Project is nearing completion.
2	Small, < \$2M: Renovation, Repair or Maintenance	Building 80-Interior Build-Out	Building 80-Interior Build-Out	\$ -	\$	-	\$	-	2	2	2026	
3	Small, < \$2M: Renovation, Repair or Maintenance	Entrance & Visitor Center Redesign Phase 1B	Entrance & Visitor Center Redesign Phase 1B	\$ 696,295	\$	-	\$	696,295	2	2	2026	New project started in FY 2024-25 and is in the design phase of construction costs. New project started in FY 2024-25.
4	Small, < \$2M: Renovation, Repair or Maintenance	Gateway Entrance Cameras	Main Entrance Camera System and Related Infrastructure	\$ -	\$	-	\$	-	2	2	2026	
5				\$ -	\$	-	\$	-				
6				\$ -	\$	-	\$	-				
* Total Minor Carryforward As July 1, 2025 :				\$ 1,011,942	\$	315,647	\$	696,295				
Large Carryforward Projects ¹												
7	Large, > \$2M: Completion of Remodeling or Infrastructure	Building 54-Fire Mitigation	Building 54 fire mitigation retrofit project	\$ 1,167	\$	-	\$	1,167	5	5	2026	Balance of funds estimated to be needed to cover additional costs for the Bldg. 54 Fire Mitigation (PECO) project. \$1,388,920 for Bldg. 234-Athletic Training Center Addition project. The project is expected to be completed in FY 2025-26.
8	Large, > \$2M: Completion of Remodeling or Infrastructure	University Park - Ath Operations Bldg.	Building 234-Athletic Training Center Addition	\$ -	\$	-	\$	-	6	6	2026	
9	Large, > \$2M: Renovation, Repair or Maintenance	Entrance & Visitor Center Redesign Phase	Entrance & Visitor Center Redesign Phase 1A	\$ -	\$	-	\$	-	4	4	2026	\$1,048,809 for the Entrance & Visitor Center Redesign Phase 1A project.The project is expected to be completed in FY 2025-26.
10	Large, > \$2M: Renovation, Repair or Maintenance	Campus Deferred Maintenance Projects	Building Renovations (B50)	\$ 9,965	\$	-	\$	9,965	4	4	2026	Additional costs for the Building Renovations B50 SFRF-DM project.
11	Large, > \$2M: Renovation, Repair or Maintenance	Campus Deferred Maintenance Projects	300K Gallon Water Storage Tank	\$ 514,430	\$	-	\$	514,430	4	4	2026	Additional fundss for the 300K Gallon Water Storage Tank SFRF-DM project.
* Total Major Carryforward As July 1, 2025 :				\$ 525,562	\$	-	\$	525,562				
Fixed Capital Outlay Totals :				\$ 1,537,504	\$	315,647	\$	1,221,857				
* Should agree with respective restricted/contractual and/or committed category totals on "Summary" tab.												

1. As defined in Board of Governors Regulation 14.003.

2. Amount deducted from July 1, 2025, beginning E&G Carryforward operating balance for fixed capital outlay project funding per Section 1011.45, F.S. and Board of Governors Regulation 9.007(3)(a)(4).

UNIVERSITY OF WEST FLORIDA

University Facilities Reserves

Additional Amounts Contributed From July 1, 2025 Beginning E&G Carryforward Balance

Pursuant to s. 1001.706(12) F.S. and Board of Governors Regulation 14.002

	Specific Project/Facility Title/Number	Additional Description of Project/Facility	Amount Added to Facility Reserves From FY25 Beginning E&G Carryforward Balance
1.	Building 54-Fire Mitigation	Building 54 fire mitigation retrofit project (1% escrow)	\$ 75,909
2.			\$ -
3.			\$ -
4.			\$ -
5.			\$ -
6.			\$ -
7.			\$ -
8.			\$ -
9.			\$ -
10.			\$ -
Total Capital Facilities Reserves as of July 1, 2025 : *			<u><u>\$ 75,909</u></u>

*Note: Should agree with line F on the "Summary" tab.

UNIVERSITY OF WEST FLORIDA

**12% Commitment to PECO Projects or Deferred Maintenance
Amounts Contributed From July 1, 2025 Beginning E&G Carryforward Balance**

Pursuant to s. 1011.45(3), F.S.

	Specific Project/Facility Title/Number	Additional Description of Project/Facility	Amount Committed to PECO Projects or Deferred Maintenance From FY25 Beginning E&G Carryforward Balance
1.	B129 Science and Engineering	B129 Science and Engineering Research Wing	\$ 3,200,000
2.	HVAC Controllers (Building Automation System)	Replacement of HVAC Controllers for Campus Building Automation System	\$ 1,000,000
3.	B58 Roof Strobic Fans	Repair/Replace the B58 Roof Strobic Fans	\$ 661,736
4.	B82 Fly Loft Louvers	Repair/Replace the B82 Fly Loft Louvers	\$ 257,106
5.			\$ -
6.			\$ -
7.			\$ -
8.			\$ -
9.			\$ -
10.			\$ -
Total Amount Committed to PECO Projects or Deferred Maintenance of July 1, 2025 : *			\$ 5,118,842

*Note: Should agree with line G. on the "Summary" tab.

UNIVERSITY OF WEST FLORIDA											
FIXED CAPITAL OUTLAY BUDGET for Fiscal Year 2025-26											
(per s. 1013.61, F.S. and Board Reg. 14.003)											
University Contact: Mr. James Manor											

10 & 11	Campus Deferred Maintenance Projects	Improvements (Campus Wide): repair and repave roadway (additional Auxiliary funding); Building Renovations B50 (additional CF funding); 300K Gallon Water Storage Tank (additional CF funding); Roof Replacements-Phase I B85 (additional Auxiliary funding), etc.	\$19,528,557	Auxiliary (Transportation Services \$743,500; Administrative Funds Allocations \$139,226)					7/1/2022	12/31/2026	replacements project, \$23,233 for B92 HVAC Upgrades, \$622 for B11 (1st floor) replace windows/doors, \$3,856 for B56A Electrical Upgrades, and \$1,837.18 for Stormwater Rehab. Additional CF funding \$1.2M for Building Renovations (B50) project (approved FY24), with \$425K unused/available budget released from the project in FY25. Additional CF funding \$2.5M (approved by the UWF BOT 11/14/2024) for the 300K Gallon Water Storage Tank project. Storage tank project construction services PO has been issued. Projects are currently in progress.
					\$882,726	\$508,736	\$373,990	\$0			
					Total:	\$19,528,557	\$12,098,499	\$6,321,085	\$1,108,973		
					Subtotal - CF Large Projects:	\$30,406,046	\$22,557,592	\$6,739,481	\$1,108,973		
State Appropriated Projects ^{5,7}											
	Critical Fire Alarm Systems Replacements (renov.)	Project to replace the control panels for aging fire alarm systems in multiple buildings.	\$1,050,000	SFRF-PECO	\$1,050,000	\$997,161	\$52,839	\$0	7/1/2022	12/31/2026	Per FY23 GAA, Section 197, State Fiscal Recovery Funding "Public Education Capital Outlay."
	Critical Roof Replacements (renov.)	Roof replacements for nine (9) campus buildings.	\$5,111,000	SFRF-PECO	\$5,111,000	\$4,369,747	\$741,253	\$0	7/1/2022	12/31/2026	Per FY23 GAA, Section 197, State Fiscal Recovery Funding "Public Education Capital Outlay."
	Replacements of HVAC Systems and Utility Distribution Systems (renov.)	HVAC systems upgrades within three (3) buildings and upgrades to select utility distribution systems across the campus.	\$2,335,000	SFRF-PECO	\$2,335,000	\$1,643,408	\$691,592	\$0	7/1/2022	12/31/2026	Per FY23 GAA, Section 197, State Fiscal Recovery Funding "Public Education Capital Outlay."
	Replacements of HVAC Systems and Utility Distribution Systems (renov.)	HVAC systems upgrades within three (3) buildings and upgrades to select utility distribution systems across the campus.	\$148,089	Auxiliary (Administrative Funds Allocations)	\$148,089	\$3,949	\$144,140	\$0	7/1/2022	12/31/2026	Additional Auxiliary funding for the B82 & B21 HVAC Replacement projects.
	Building 54-Fire Mitigation YR22	Building 54 - Fire Mitigation to retrofit the entire building with firewalls, make adjustments to egress routes, sprinkler system installation, HVAC return air pathways, etc.	\$6,250,000	PECO/GR	\$6,250,000	\$6,250,000	\$0	\$0	7/1/2021	6/30/2026	Project is not yet complete. Project spending continues with additional CF funds needed to cover costs to complete the project (see above CF-Large Projects.)
	Science and Engineering Research Wing (SF 3194) YR24	Bldg. 129 - Science and Engineering Research Wing	\$21,122,335	PECO/GR	\$21,122,335	\$476,760	\$6,881,170	\$13,764,405	7/1/2023	6/30/2027	Architectural and engineering design services in progress.
	Triumph Grant- Science and Engineering Research Wing	Bldg. 129 - Science and Engineering Research Wing	\$15,000,000	Grant	\$15,000,000	\$0	\$6,249,960	\$8,750,040	7/1/2023	6/30/2027	Triumph grant proposal approved for architectural and engineering design fees, construction costs, and FF&E.
	Science and Engineering Research Wing (SF 3194) YR24	Bldg. 129 - Science and Engineering Research Wing	\$3,200,000	CF	\$3,200,000	\$0	\$3,200,000	\$0	7/1/2023	6/30/2027	12% Carryforward commitment (see Line G on "Summary" tab of CF Spending Plan).
	Critical Infrastructure-Satellite Utilities Plant Phase I (SF 1461) (HF0361) YR24	Critical Infrastructure-Satellite Utilities Plant Phase I	\$10,000,000	PECO/GR	\$10,000,000	\$0	\$10,000,000	\$0	7/1/2023	6/30/2026	Architectural and engineering design services PO has been issued.
	Critical Infrastructure-Satellite Utilities Plant Phase II (SF 1202) (HF2818) YR25	Critical Infrastructure-Satellite Utilities Plant Phase II	\$10,000,000	PECO/GR	\$10,000,000	\$0	\$0	\$10,000,000	7/1/2024	6/30/2027	Phase I design is currently in progress. Estimated spending will be updated when this phase of the project commences.
	Next Gen Innovators (HF 1748) YR26	Next Gen Innovators with Northwest Florida State College - Lab renovations/remodeling, technology, and equipment for classrooms/labs at the Emerald Coast Campus, Fort Walton Beach, FL	\$2,000,000	PECO/GR	\$2,000,000	\$0	\$0	\$2,000,000	7/1/2025	6/30/2027	Estimated spending will be updated when the project commences.
	B22 Outdoor Patio YR23	Building 22 - Outdoor Patio	\$150,000	CITF	\$150,000	\$69,413	\$80,587	\$0	7/1/2022	6/30/2026	Construction phase for the patio is in progress.
	University Commons Patio YR25	Building 22 - Patio Ph 1A	\$105,280	CITF	\$105,280	\$0	\$105,280	\$0	7/1/2024	6/30/2026	Construction phase for the patio is in progress.
	University Commons Patio YR26	Building 22 - Patio Ph 1B	\$488,319	CITF	\$488,319	\$0	\$0	\$488,319	7/1/2025	6/30/2027	Estimated spending will be updated when this phase of the project commences.
	B22 University Commons Outdoor Patio	Building 22 - Outdoor Patio	\$15,557	Auxiliary (Student Activities funding transferred to Auxiliary FCO project account)	\$15,557	\$949	\$14,608	\$0	7/1/2024	6/30/2026	Additional Auxiliary funding for the B22 University Commons Outdoor Patio Phase 1 project. \$20,455 temporary funding for Ph 1B in FY25 removed/replaced with CITF funding FY26 (see above).
	Conference Center Magnetic Door Holders YR25	Building 22 - Conference Center Magnetic Door Holders	\$54,165	CITF	\$54,165	\$13,280	\$40,885	\$0	7/1/2024	6/30/2026	Design phase is currently in progress.
	Softball Field Lights YR25	Softball Lights - Softball Field (area E15)	\$487,000	CITF	\$487,000	\$48,716	\$438,284	\$0	7/1/2024	6/30/2026	Project equipment purchases in progress.
	Softball Field Lights YR25	Softball Lights - Softball Field (area E15)	\$155,770	Auxiliary (Administrative Funds Allocations)	\$155,770	\$0	\$155,770	\$0	7/1/2024	6/30/2026	Project equipment purchases in progress.
	HLS Facility Sound System YR25	Building 72 - HLS Facility Sound System	\$213,900	CITF	\$213,900	\$82,224	\$131,676	\$0	7/1/2024	6/30/2026	Project equipment purchases in progress.
	Community Garden Boardwalk YR26	Community Garden - Wooden Boardwalk	\$500,000	CITF	\$500,000	\$0	\$500,000	\$0	7/1/2025	6/30/2026	Project is expected to be completed in FY26. CF additional funding provided \$315,647 (see above CF-Small Projects).

	Community Garden Boardwalk YR26	Community Garden - Wooden Boardwalk	\$323,600	Auxiliary (Student Activities funding transferred to Auxiliary FCO project account)	\$323,600	\$38,479	\$285,121	\$0	7/1/2024	6/30/2026	Project is expected to be completed in FY26. Additional Auxiliary funding for the Community Garden Wooden Boardwalk project.
	Sports Lighting Complex YR26	Athletics-Sports Lighting Complex	\$200,000	CITF	\$200,000	\$0	\$0	\$200,000	7/1/2025	6/30/2027	Estimated spending will be updated when the project commences.
	ERCCD Flooring YR26	Building 99 - ERCCD Flooring	\$60,000	CITF	\$60,000	\$0	\$0	\$60,000	7/1/2025	6/30/2027	Estimated spending will be updated when the project commences.
	ERCCD Smart Boards YR26	Building 99 - ERCCD Smart Boards	\$15,000	CITF	\$15,000	\$0	\$0	\$15,000	7/1/2025	6/30/2027	Estimated spending will be updated when the project commences.
	Blue Emergency Lights YR26	Campus Blue Emergency Lights	\$76,858	CITF	\$76,858	\$0	\$0	\$76,858	7/1/2025	6/30/2027	Estimated spending will be updated when the project commences.
	Aquatic Center Diving Boards YR26	B73 Aquatic Center Diving Boards	\$100,000	CITF	\$100,000	\$0	\$100,000	\$0	7/1/2025	6/30/2026	Project is expected to be completed in FY26.
	Aquatic Center Diving Boards YR26	B73 Aquatic Center Diving Boards	\$41,912	Auxiliary (Administrative Funds Allocations)	\$41,912	\$0	\$41,912	\$0	7/1/2024	6/30/2026	Project is expected to be completed in FY26. Additional Auxiliary funding for the Aquatic Center Diving Boards project.
	Conference Center Technology YR26	Building 22 - Conference Center Technology	\$150,000	CITF	\$150,000	\$0	\$0	\$150,000	7/1/2025	6/30/2027	Estimated spending will be updated when the project commences.
			Subtotal - State Appropriated Projects:		\$79,353,785	\$13,994,086	\$29,855,077	\$35,504,622			
Non-Appropriated Projects ^{6,7}											
				Auxiliary (Administrative Funds Allocation -- Unobligated Reserves less Debt Service)	25,000,000						Topographic survey for project site(s) and surrounding areas underway, including geo-technical engineering testing and wetland delineation. Programming and visioning phase is completed. Architectural design phase is currently in progress. Construction phase expected to begin in FY26. Board of Governors approval on June 27, 2024 to use \$25M non-Athletic Auxiliary funding for an internal loan to be paid back over twenty (20) years with interest. Escambia County Florida Board of County Commissioners approval on July 10, 2025 for \$2M Tourist Development Tax (TDT) funding for the UWF Multi-Use Outdoor Stadium construction project. Additional Auxiliary funding \$2.9M is reserved for the project. Auxiliary Administrative Funds includes Auxiliary Administrative Overhead, PCard Rebate, and Auxiliary Interest Earnings. Inception-to-date costs includes \$25,010 for the preliminary phased design and master planning for on-campus stadium development with conceptual renderings and/or animations completed in FY23 (funded by Athletics Admin).
				Auxiliary (Administrative Funds Allocation)	2,974,990						
	B236 Campus Stadium	Campus stadium (UWF main campus) with 7,500 total seating capacity in the Phase I construction	\$45,000,000	Foundation-Fundraising/Donations	15,000,000	\$207,718	\$5,117,080	\$39,675,202	7/1/2021	6/30/2028	
				Escambia County Florida - Tourist Development Tax (TDT) Fund	2,000,000						
				Athletics (Athletics Administrative Funds)	<u>25,010</u>						
				Total:	\$45,000,000						
	Triumph Grant- B37 Renovation	Nursing & Resp Therapy #293 Renovation (B37)	\$1,411,166	Grant	\$1,411,166	\$1,013,700	\$397,466	\$0	7/1/2023	6/30/2026	FCO small budget increase to finish the project. Project is nearing completion with final punch list items in progress.
	Baseball Field Lights	Baseball Field Lights	\$675,000	Auxiliary (Administrative Funds Allocation)	\$675,000	\$0	\$675,000	\$0	7/1/2025	6/30/2026	Project is expected to be completed in FY26.
			Subtotal - Non-Appropriated Projects:		\$47,086,166	\$1,221,418	\$6,189,546	\$39,675,202			
TOTALS:			\$159,794,170		\$159,794,170	\$39,156,694	\$44,348,679	\$76,288,797			

Notes:

- 1) *Education & General (E&G) Operating Projects* is a consolidated line item of all FCO projects, as defined in Board reg 14.001, funded from current year E&G operating funds. No individual project funded in whole or in part shall exceed \$1M, per Board reg 9.007(3)(a)1.
- 2) *Dedicated Reserves for Future Maintenance* - is a consolidated line item of planned maintenance expenditures to be funded from the dedicated reserves established pursuant to Section 1001.706(12)(c)1,F.S. and/or Board reg 14.002.
- 3) *Carryforward (CF) - Small Projects* is a consolidated line item of all FCO projects with a cost up to \$2M funded in whole or in part from from CF funds, pursuant to Board reg. 14.003(2)(b). Includes replacement of facilities less than 10,000 gross sf. This is a single line item in the FCO budget. For a list of individual projects, refer to the Carryforward Spending Plans (CFSP).
- 4) *Carryforward (CF) - Large Projects* includes any FCO project funded in whole or in part from CF funds, where total individual FCO project cost exceeds \$2M, pursuant to Board reg. 14.003(2)(c) and expenditure limits described therein. May also be reflected as one of multiple funding sources under categories State Appropriate Projects and Non-Appropriated Projects.
- 5) *State Appropriated Projects* - this category includes all FCO projects utilizing funds originally appropriated as FCO funds by the State of Florida, notwithstanding criteria in Board reg 14.001. These funds should never be included in the operating budget. Examples, PECO (including Sum-of-Digits) and CITF. Reference Board reg 14.003(12)(d). For the purpose herein, all projects \$2 million or less can be consolidated into a single line item.
- 6) *Non-Appropriated Projects* - this category includes all university FCO projects that have not directly or indirectly used funds appropriated by the State. Examples include private donations, athletic revenues, federal grants, housing/parking revenue bonds, etc. Reference Board reg 14.003(2)(e). For the purpose herein, all projects \$2 million or less can be consolidated into a single line item.
- 7) In light of the definition of "board" Section 1013.01, F.S., and the requirements of s. 1031.61, F.S., the FCO Budget does not apply to those projects acquired, constructed, and owned by a Direct Support Organization or under a Public Private Partnership.



2025-2026 Operating Budget & E&G Carryforward Spending Plan

University Name: University of West Florida

2025-2026 Operating Budget & E&G Carryforward Spending Plan Certification Representations

I hereby certify to the Board of Governors that the referenced 2025-2026 Operating Budget and E&G Carryforward Spending Plan provided to the Board of Governors in accordance with my fiduciary responsibility to the university are true and materially correct to the best of my knowledge. I further certify that these documents have been reviewed and approved by the Board of Trustees at its meeting held on September 18, 2025, and that funds will only be expended in accordance with the approved budget as well as all applicable Statutes, Board of Governors' Regulations, and university regulations. I understand that any unsubstantiated, false, misleading, or withheld information relating to these statements may render this certification void. My signature below acknowledges that I have read and understand these statements.

Certification: _____ Date _____
Chief Financial Officer

Certification: _____ Date _____
President

I certify that the above-referenced university documents for fiscal year 2025-2026 have been approved by the University Board of Trustees and are true and materially correct to the best of my knowledge.

Certification: _____ Date _____
Board of Trustees Chair

14.003 Fixed Capital Outlay Projects – University Budgeting Procedures

(1) Each university will prepare an annual Fixed Capital Outlay (FCO) Budget, in accordance with the instructions, guidelines, and standard formats provided by the Chancellor. The FCO Budget must be approved by the university board of trustees and the Board of Governors. Such approval remains in effect for the life of the FCO Projects. The annual FCO Budget must include all FCO Projects, including previously approved projects that have not yet been completed.

(2) FCO Projects shall be listed by category or categories in the University FCO Budget as follows:

FCO Budget Categories

a. Education & General (E&G) Operating Projects – This category is consolidated and includes all FCO Projects funded from current year E&G operating funds. No individual project in this category, funded in whole or in part with E&G operating funds, shall exceed \$1 million, pursuant to Board Regulation 9.007(3)(a)1.

Boards of Trustees may adopt policies requiring more detailed line-item budgeting at the local level.

b. Carryforward (CF) - Small Projects – This category is consolidated and includes all FCO Projects with a total per-project cost up to \$2 million, funded in whole or in part from CF funds. Allowable uses include maintenance, repair, renovation, remodeling, demolition of existing educational facilities and existing general site improvements (E&G campus real property improvements), and replacement of a Minor Facility. This category is budgeted as a single line in the FCO Budget. This may also be reflected as one of multiple funding sources under categories State Appropriated Projects and Non-Appropriated Projects.

c. Carryforward (CF) – Large Projects – This category includes FCO Projects funded in whole or in part from CF funds, where the total project cost is greater than \$2 million. This may also be reflected as one of multiple funding sources under categories State Appropriated Projects and Non-Appropriated Projects. Allowable uses include the following:

- i. Completion of a Public Education Capital Outlay Project that has received a state appropriation and is included on the Board's incomplete project list maintained pursuant to s. 1001.706(12)(d), F.S.
- ii. A renovation, repair, or maintenance project consistent with s. 1013.64(1), F.S. and replacement of a Minor Facility.
- iii. A remodeling or infrastructure project, including a project for a developmental research school, if such project is recommended

in the latest educational plant survey.

- iv. Repair or replacement of Education & General Facilities necessary due to damage caused by a natural disaster.

d. State Appropriated Projects – This category includes all FCO Projects using funds originally appropriated as FCO funds by the State of Florida, notwithstanding the criteria provided in Board Regulation 14.001. These funds should never be included in the university operating budget. Examples include PECO and Capital Improvement Trust Fund (CITF).

e. Non-Appropriated Projects – This category includes all FCO Projects that have not directly or indirectly used funds appropriated by the State. Examples of such funding sources would include housing revenue bonds, parking revenue bonds, private donations, federal grants, insurance proceeds, and athletic revenues.

(3) For the purpose of this regulation, FCO Projects do not apply to those projects acquired, constructed, and owned by a Direct Support Organization or under a Public Private Partnership; the requirements for those projects are addressed in either the Debt Management Guidelines or the Public Private Partnership Guidelines.

(4) The FCO Budget may be amended, subject to use of only the categories authorized in section (2), as follows:

a. E&G Operating Projects - must be approved by the board of trustees or designee.

b. CF Small Projects – Individual new projects up to \$2 million, as well as increases up to \$2 million on individual existing projects, must be approved by the board of trustees or designee.

c. CF Large Projects, State Appropriated Projects, and Non-Appropriated Projects – Individual new projects greater than \$5 million added to the FCO Budget, as well as increases greater than \$5 million to individual existing projects, require Board of Trustees and Board of Governors' approval.

(5) FCO Project spending may be reported annually at the end of the fiscal year at the project detail level, in a format specified by the Chancellor.

2024 Florida Statutes

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Title XLVIII EARLY LEARNING-20 EDUCATION CODE

Chapter 1011 PLANNING AND BUDGETING

SECTION 45 End of year balance of funds.

1011.45 End of year balance of funds.—Unexpended amounts in any fund in a university current year operating budget shall be carried forward and included as the balance forward for that fund in the approved operating budget for the following year.

(1) Each university shall maintain a minimum carry forward balance of at least 7 percent of its state operating budget; however, a university may retain and report to the Board of Governors an annual reserve balance exceeding that amount. If a university fails to maintain a 7 percent balance in state operating funds, the university shall submit a plan to the Board of Governors to attain the 7 percent balance of state operating funds within the next fiscal year.

(2) Each university that retains a state operating fund carry forward balance in excess of the 7 percent minimum shall submit a spending plan for its excess carry forward balance. The spending plan shall be submitted to the university's board of trustees for review, approval, or, if necessary, amendment by September 30, 2020, and each September 30 thereafter. The Board of Governors shall review, approve, and amend, if necessary, each university's carry forward spending plan by November 15, 2020, and each November 15 thereafter.

(3) A university's carry forward spending plan must include the estimated cost per planned expenditure and a timeline for completion of the expenditure. A carry forward spending plan may include retention of the carry forward balance as a reserve fund to be used for authorized expenses in subsequent years. Authorized expenditures in a carry forward spending plan may include:

(a) Commitment of funds to a public education capital outlay project for which an appropriation has previously been provided that requires additional funds for completion and which is included in the list required by s. [1001.706](#)(12)(d);

(b) Completion of a renovation, repair, or maintenance project that is consistent with s. [1013.64](#)(1) or replacement of a minor facility;

(c) Completion of a remodeling or infrastructure project, including a project for a developmental research school, if such project is survey recommended pursuant to s. [1013.31](#);

(d) Completion of a repair or replacement project necessary due to damage caused by a natural disaster for buildings included in the inventory required pursuant to s. [1013.31](#);

(e) Operating expenditures that support the university's mission;

(f) Any purpose specified by the board or in the General Appropriations Act, including the requirements in s. [1001.706](#)(12)(c) or similar requirements pursuant to Board of Governors regulations; and

(g) A commitment of funds to a contingency reserve for expenses incurred as a result of a state of emergency declared by the Governor pursuant to s. [252.36](#).

(4) Annually, by September 30, the chief financial officer of each university shall certify the unexpended amount of funds appropriated to the university from the General Revenue Fund, the Educational Enhancement Trust Fund, and the Education/General Student and Other Fees Trust Fund as of June 30 of the previous fiscal year.

(5) A university may spend the minimum carryforward balance of 7 percent if a demonstrated emergency exists and the plan is approved by the university's board of trustees and the Board of Governors.

History.—s. 640, ch. 2002-387; s. 15, ch. 2019-103; s. 184, ch. 2020-2; s. 16, ch. 2020-117; s. 3, ch. 2023-95; s. 1, ch. 2024-124.

**Board of Trustees
Full Board Meeting
September 18, 2025**

2024-2025 Annual Report of Self-Supporting and Market Tuition Rate Programs

Recommended Action:

Approve the Annual Report of Self-Supporting and Market Tuition Rate Programs for Fiscal Year 2024-2025.

Background Information:

Board of Governors (BOG) Regulation 8.002, "Self-Supporting and Market Tuition Rate Program and Course Offerings" requires UWF to submit an annual report on self-supporting and market tuition rate programs. The annual report has been required to be submitted to the Board of Governors pursuant to regulation 8.002 in previous years. However, a change to the regulation in November 2022 requires the annual report to be approved by the University of West Florida Board of Trustees prior to submission to the Board of Governors. For this reason, these programs have been offered/approved as self-supporting or market tuition rate for many years.

Implementation Plan:

Report to be approved by the UWF Board of Trustees on September 18, 2025

Report to be submitted to the Board of Governors by October 1, 2025

Fiscal Implications:

The total gross revenue for fiscal year 2024-2025 is approximately \$21.95 million, which covers the cost of the programs which is required pursuant to the BOG regulation.

Relevant Authority:

BOG Regulation 8.002, Self-supporting and Market Tuition Rate Program and Course Offerings

Supports Strategic Direction(s):

Strategic Direction 1: Student Centered and Focused and Strategic Direction 3: Exceptional Academic Programming and Scholarship Aligned with State Needs

Supporting Documents:

1. Annual Report of Self-Supporting and Market Tuition Rate Programs for Fiscal Year 2024-2025
2. BOG Regulation 8.002, Self-supporting and Market Tuition Rate Program and Course Offerings

Prepared by:

Dacia Larin, Assistant Vice President, Division of Academic Affairs

Presenter:

- Jaromy Kuhl, Senior Vice President and Provost
- Jeffrey Djerlek, Senior Associate Vice President of Finance and University Controller

Fiscal Year 2024-2025 Self-Supporting and Market Tuition Rate Report

											Program Start Date									
CIP Code (XX.XXXX)	Program Name (in inventory)	Program Level	Program Type	Local Program Name (if different from inventory name)	Major or Track Name (if different)	Program Length (in credit hours)	Tuition Type	Mode of Delivery	UBOT Tuition Approval Date	BOG Tuition Approval Date	Term	Year	Tuition Rate Per Credit Hour - Resident	Tuition Rate Per Credit Hour - Non-Resident	Program Fees - Resident	Program Fees - Non-Resident	Resident Enrollment	Non-Resident Enrollment	Degree/ Program Completions	Revenues
13.0301	Curriculum & Instruction	Graduate	Doctoral		C&I Curr & Assessmnt	60	Market Rate	Online	6/17/21	11/1/13	Spring	2014	\$ 425.00	\$ 425.00			29	11	24	\$ 47,433.00
11.0101	Computer and Information Sciences, C	Graduate	Master's		Computer Science	30	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			34	26	14	\$ 159,046.00
11.0103	Information Technology	Graduate	Master's		Information Technology	30	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			53	24	26	\$ 372,498.00
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - Data Security	30	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			28	17	12	\$ 180,776.44
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - National Security	30	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			35	12	8	\$ 188,810.95
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - Security Mgmt	30	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			48	32	23	\$ 321,380.33
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - Softw & Sys Sec	30	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			47	21	30	\$ 273,173.28
13.0301	Curriculum & Instruction	Graduate	Master's		C&I - Sec Comprehensive	33	Self-supporting	Online	6/17/21		Spring	2014	\$ 416.50	\$ 416.50			16	11	14	\$ 122,801.40
13.0301	Curriculum & Instruction	Graduate	Master's		C&I Elem Comprehensive	33	Self-supporting	Online	6/17/21		Spring	2014	\$ 416.50	\$ 416.50			33	10	18	\$ 195,572.60
13.0301	Curriculum & Instruction	Graduate	Master's		C&I Mid Lvl Comprehensive	33	Self-supporting	Online	6/17/21		Spring	2014	\$ 416.50	\$ 416.50			7	3	6	\$ 45,482.00
13.0401	Educl. Leadership & Adm., Gen.	Graduate	Master's		Educ Leadership Cert	33	Market Rate	Online	6/17/21	11/1/13	Fall	2012	\$ 416.50	\$ 416.50			223	31	98	\$ 1,179,165.00
45.0702	Geographic Info Sci & Cart.	Graduate	Master's		Geographic Info Sys Admin	36	Self-supporting	Online	6/17/21		Fall	2016	\$ 425.00	\$ 425.00			40	16	12	\$ 193,031.00
51.1503	Clinical/Medical Social Work	Graduate	Master's		Social Work- Advanced Standing	30	Self-supporting	Online	6/17/21		Spring	2019	\$ 450.00	\$ 450.00			65	46	52	\$ 924,670.75
51.1503	Clinical/Medical Social Work	Graduate	Master's		Social Work- Traditional	60	Self-supporting	Online	6/17/21		Spring	2019	\$ 450.00	\$ 450.00			185	69	49	\$ 2,115,913.25
51.3801	Registered Nursing/Rn	Graduate	Master's		Nurse Executive	39	Self-supporting	Online	6/17/21		Spring	2014	\$ 425.00	\$ 425.00			37	5	12	\$ 250,457.59
51.3801	Registered Nursing/Rn	Graduate	Master's		Nursing Education	39	Self-supporting	Online	6/17/21		Spring	2014	\$ 425.00	\$ 425.00			53	14	11	\$ 399,539.49
51.3805	Family Nurse/Nursing	Graduate	Master's		Family Nurse Practitioner	45	Self-supporting	Online	6/17/21		Fall	2019	\$ 500.00	\$ 500.00			390	88	101	\$ 2,850,445.92
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Accounting	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			24	4	7	\$ 118,094.72
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Aviation Economics	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			5	1		\$ 25,306.01
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Business Analytics	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			102	27	23	\$ 544,079.22
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Cybersecurity Mgmt	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			25	9	3	\$ 143,400.73
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Entrepreneurship	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			33	9	7	\$ 177,142.07
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Finance	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			59	20	7	\$ 333,195.80
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA General	33	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			206	72	66	\$ 1,172,511.82
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Hospitality & Tourism	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			2			\$ 8,435.34
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Human Resources Mgmt	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			94	16	18	\$ 463,943.52
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Supply Chain Logistics Mgt	36	Self-supporting	Online	6/17/21		Fall	2015	\$ 456.50	\$ 456.50			27	14	10	\$ 172,924.40
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		Executive MBA	36	Self-supporting	Online	6/17/21		Fall	2023	\$ 456.50	\$ 456.50			18	2	1	\$ 84,353.37
52.0301	Accounting	Graduate	Master's		MAcc Business Analysis and Reporting	30	Market Rate	Online	6/17/21	11/1/13	Spring	2025	\$ 456.50	\$ 456.50			12	2	18	\$ 32,183.25
52.0301	Accounting	Graduate	Master's		MAcc Taxation	30	Market Rate	Online	6/17/21	11/1/13	Spring	2025	\$ 456.50	\$ 456.50			3		18	\$ 8,217.00
52.0301	Accounting	Graduate	Master's		MAcc Analytics	30	Market Rate	Online	6/17/21	11/1/13	Spring	2025	\$ 456.50	\$ 456.50			2		2	\$ 5,478.00
52.0301	Accounting	Graduate	Master's		MAcc Information Systems and Controls	30	Market Rate	Online	6/17/21	11/1/13	Spring	2025	\$ 456.50	\$ 456.50			2		4	\$ 2,739.00
11.0802	Advanced Technology - Big Data	Graduate	Certificate		Data Science Certificate	12	Self-supporting	Online	6/17/21		Spring	2021	\$ 384.60	\$ 384.60			211	90	32	\$ 466,351.80
11.0802	Advanced Technology - Big Data	Graduate	Certificate		Advanced Data Science	9	Self-supporting	Online	6/17/21		Fall	2023	\$ 384.60	\$ 384.60			128	62	8	\$ 250,821.87
11.1003	Cybersecurity	Graduate	Certificate		Cybersecurity Certificate	12	Self-supporting	Online	6/17/21		Fall	2019	\$ 425.00	\$ 425.00			5	4	5	\$ 18,487.50
13.0301	Curriculum & Instruction	Graduate	Certificate		TESOL Certificate	15	Self-supporting	Online	6/17/21		Spring	2014	\$ 416.50	\$ 416.50			12	10	1	\$ 39,984.00
13.0501	Educl./Instrc. Tech.	Graduate	Certificate		Current and Emerging Technologies Certificate	9	Self-supporting	Online	6/17/21		Fall	2016	\$ 384.60	\$ 384.60			45	8	7	\$ 99,226.80
13.0501	Educl./Instrc. Tech.	Graduate	Certificate		Online Teaching and Learning Certificate	9	Self-supporting	Online	6/17/21		Fall	2016	\$ 384.60	\$ 384.60			35	3	6	\$ 62,305.20
13.0501	Educl./Instrc. Tech.	Graduate	Certificate		Human Perf Improvement Certificate	9	Self-supporting	Online	6/17/21		Fall	2016	\$ 384.60	\$ 384.60			40	6	10	\$ 67,785.75
13.1001	Special Educ. & Teaching, Gen.	Graduate	Certificate		Graduate ABA Certificate	18	Self-supporting	Online	6/17/21		Fall	2023	\$ 384.60	\$ 384.60			1,173	551	186	\$ 5,644,415.00
45.0702	Geographic Info Sci & Cart.	Graduate	Certificate		Graduate GIS Certificate	12	Self-supporting	Online	6/17/21		Fall	2016	\$ 630.00	\$ 630.00			34	14	7	\$ 247,259.88
11.1003	Computer and Information Systems Se	Undergraduate	Certificate		Cyber Technologies Certificate	9	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			54	5	1	\$ 31,314.14
14.1901	Mechanical Engineering	Undergraduate	Certificate		Engineering Professional Certificate	9	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			182	16	4	\$ 154,127.47
27.0101	Mathematics, Gen.	Undergraduate	Certificate		Data Science Certificate	12	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			166	23	13	\$ 151,970.55
40.0501	Chemistry, Gen.	Undergraduate	Certificate		Chemistry for Laboratory Health Sciences Certificate	9	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			32	23	18	\$ 72,219.37
43.0104	Criminal Just/Safety Studies	Undergraduate	Certificate		Intelligence Analysis Certificate	12	Self-supporting	Online	6/17/21		Fall	2013	\$ 218.98	\$ 218.98			57	9	3	\$ 82,637.03
45.0901	Intl. Relations & Affairs	Undergraduate	Certificate		Japanese Language and Culture Certificate	11	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			100	22	6	\$ 124,824.31
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Technologist in Microbiology	23	Self-supporting	Online	6/17/21		Spring	2019	\$ 218.98	\$ 218.98			8	0	4	\$ 19,927.18
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Technologist in Hematology	15	Self-supporting	Online	6/17/21		Spring	2019	\$ 218.98	\$ 218.98			0	0		\$ -
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Technologist in Clinical Chemistry	22	Self-supporting	Online	6/17/21		Spring	2019	\$ 218.98	\$ 218.98			0	0		\$ -
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Categorical Concentration in Core Lab	33	Self-supporting	Online	6/17/21		Spring	2019	\$ 218.98	\$ 218.98			14	3	11	\$ 41,100.65
03.0104	Environmental Science	Undergraduate	Certificate		Geographic Information Sc	24	Self-supporting	Online	6/17/21		Spring	2008	\$ 218.98	\$ 218.98			65	15	8	\$ 153,432.04
51.0000	Hlth Svcs./Sci/Alldg Hlth/Gen.	Undergraduate	Certificate		Undergraduate ABA Certificate	15	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			361	123	39	\$ 794,588.00
51.0000	Hlth Svcs./Sci/Alldg Hlth/Gen.	Undergraduate	Certificate		Special Topics in Healthcare Administration Undergraduate Certificate	9	Self-supporting	Online	6/17/21		Fall	2023	\$ 218.98	\$ 218.98			268	21	34	\$ 298,864.11
27.0101	Mathematics, Gen.	Undergraduate	Certificate		Data in the Workplace	9	Self-supporting	Online	6/17/21		Fall	2024	\$ 218.98	\$ 218.98			30	4		\$ 17,029.02
23.0101	Engl Lang. & Lit., Gen	Undergraduate	Certificate		AI in the Workplace	9	Self-supporting	Online	6/17/21		Spring	2025	\$ 218.98	\$ 218.98			4			\$ 2,627.76

Fiscal Year 2024-2025 Self-Supporting and Market Tuition Rate Report													
CIP Code (XX.XXXX)	Program Name (in inventory)	Program Level	Program Type	Local Program Name (if different from inventory name)	Major or Track Name (if different)	Expenditures	Comparable E&G Program				CIP Code (XX.XXXX)	Program Status	Additional Comments (if any)
							Comparable E&G Program?	Program Name	Degree/ Program Level				
13.0301	Curriculum & Instruction	Graduate	Doctoral		C&I Curr & Assessmnt	\$ 12,554.00						Active	
11.0101	Computer and Information Sciences, C	Graduate	Master's		Computer Science	\$ 161,778.00	Yes	Comp Sc - Comp Sc	Masters		11.0101	Active	
11.0103	Information Technology	Graduate	Master's		Information Technology	\$ 320,559.00	Yes	Information Technology	Masters		11.0103	Active	
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - Data Security	\$ 165,765.56						Active	
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - National Security	\$ 173,132.92						Active	
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - Security Mgmt	\$ 294,694.33						Active	
11.1003	Computer and Information Systems Se	Graduate	Master's		Cybersecurity - Softw & Sys Sec	\$ 250,490.18						Active	
13.0301	Curriculum & Instruction	Graduate	Master's		C&I - Sec Comprehensive	\$ 122,300.21						Active	
13.0301	Curriculum & Instruction	Graduate	Master's		C&I Elem Comprehensive	\$ 194,774.41						Active	
13.0301	Curriculum & Instruction	Graduate	Master's		C&I Mid Lvl Comprehensive	\$ 45,296.38						Active	
13.0401	Educl. Leadership & Adm., Gen.	Graduate	Master's		Educ Leadership Cert	\$ 1,041,923.00						Active	
45.0702	Geographic Info Sci & Cart.	Graduate	Master's		Geographic Info Sys Admin	\$ 207,009.00						Active	
51.1503	Clinical/Medical Social Work	Graduate	Master's		Social Work- Advanced Standing	\$ 749,213.81	Yes	Social Work- Advanced Standing	Masters		51.1503	Active	
51.1503	Clinical/Medical Social Work	Graduate	Master's		Social Work- Traditional	\$ 1,714,417.19	Yes	Social Work- Traditional	Masters		51.1503	Active	
51.3801	Registered Nursing/Rn	Graduate	Master's		Nurse Executive	\$ 239,716.61						Active	
51.3801	Registered Nursing/Rn	Graduate	Master's		Nursing Education	\$ 382,405.07						Active	
51.3805	Family Nurse/Nursing	Graduate	Master's		Family Nurse Practitioner	\$ 2,728,203.32						Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Accounting	\$ 90,189.17	Yes	MBA Accounting	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Aviation Economics	\$ 19,326.25	Yes	MBA Aviation Economics	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Business Analytics	\$ 415,514.37	Yes	MBA Business Analytics	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Cybersecurity Mgmt	\$ 109,515.41	Yes	MBA Cybersecurity Mgmt	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Entrepreneurship	\$ 135,283.75	Yes	MBA Entrepreneurship	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Finance	\$ 254,462.29	Yes	MBA Finance	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA General	\$ 895,449.57	Yes	MBA General	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Hospitality & Tourism	\$ 6,442.08	Yes	MBA Hospitality & Tourism	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Human Resources Mgmt	\$ 354,314.58	Yes	MBA Human Resources Mgmt	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		MBA Supply Chain Logistics Mgt	\$ 132,062.71	Yes	MBA Supply Chain Logistics Mgt	Masters		52.0201	Active	
52.0201	Business Adm. & Mangt., Gen.	Graduate	Master's		Executive MBA	\$ 64,420.83	Yes	Executive MBA	Masters		52.0201	Active	
52.0301	Accounting	Graduate	Master's		MAcc Business Analysis and Reporting	\$ 8,994.97						Active	
52.0301	Accounting	Graduate	Master's		MAcc Taxation	\$ 1,927.49						Active	
52.0301	Accounting	Graduate	Master's		MAcc Analytics	\$ 1,285.00						Active	
52.0301	Accounting	Graduate	Master's		MAcc Information Systems and Controls	\$ 1,285.00						Active	
11.0802	Advanced Technology - Big Data	Graduate	Certificate		Data Science Certificate	\$ 193,472.81						Active	
11.0802	Advanced Technology - Big Data	Graduate	Certificate		Advanced Data Science	\$ 123,119.06						Active	
11.1003	Cybersecurity	Graduate	Certificate		Cybersecurity Certificate	\$ 9,615.26						Active	
13.0301	Curriculum & Instruction	Graduate	Certificate		TESOL Certificate	\$ 27,436.99						Active	
13.0501	Educl./Instrc. Tech.	Graduate	Certificate		Current and Emerging Technologies Certificate	\$ 59,001.52						Active	
13.0501	Educl./Instrc. Tech.	Graduate	Certificate		Online Teaching and Learning Certificate	\$ 42,302.98						Active	
13.0501	Educl./Instrc. Tech.	Graduate	Certificate		Human Perf Improvement Certificate	\$ 51,208.87						Active	
13.1001	Special Educ. & Teaching, Gen.	Graduate	Certificate		Graduate ABA Certificate	\$ 3,629,512.00						Active	
45.0702	Geographic Info Sci & Cart.	Graduate	Certificate		Graduate GIS Certificate	\$ 118,964.60						Active	
11.1003	Computer and Information Systems Se	Undergraduate	Certificate		Cyber Technologies Certificate	\$ 13,419.91						Active	
14.1901	Mechanical Engineering	Undergraduate	Certificate		Engineering Professional Certificate	\$ 68,256.19						Active	
27.0101	Mathematics, Gen.	Undergraduate	Certificate		Data Science Certificate	\$ 60,434.73						Active	
40.0501	Chemistry, Gen.	Undergraduate	Certificate		Chemistry for Laboratory Health Sciences Certificate	\$ 62,007.11						Active	
43.0104	Criminal Just/Safety Studies	Undergraduate	Certificate		Intelligence Analysis Certificate	\$ 33,686.37						Active	
45.0901	Intl. Relations & Affairs	Undergraduate	Certificate		Japanese Language and Culture Certificate	\$ 97,564.98						Active	
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Technologist in Microbiology	\$ 16,694.18						Active	
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Technologist in Hematology	\$ -						Active	
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Technologist in Clinical Chemistry	\$ -						Active	
51.1005	ClinLab Sci/Med Tech./Tchngst	Undergraduate	Certificate		Categorical Concentration in Core Lab	\$ 35,475.12						Active	
03.0104	Environmental Science	Undergraduate	Certificate		Geographic Information Sc	\$ 73,821.04						Active	
51.0000	Hlth Svcs./Sci/Alld Hlth/Gen.	Undergraduate	Certificate		Undergraduate ABA Certificate	\$ 643,353.00						Active	
51.0000	Hlth Svcs./Sci/Alld Hlth/Gen.	Undergraduate	Certificate		Special Topics in Healthcare Administration Undergraduate Certificate	\$ 119,245.96						Active	
27.0101	Mathematics, Gen.	Undergraduate	Certificate		Data in the Workplace	\$ 10,123.19						Active	
23.0101	Engl Lang. & Lit., Gen	Undergraduate	Certificate		AI in the Workplace	\$ 525.55						Active	

Column Definitions	
Instructions: Institutions are required to provide the information below for all non-E&G college-credit programs, including sponsored credit, certificate, and degree programs at all levels and any majors or tracks that exist under an approved degree program. Do not combine cells or alter the template in any way when reporting the data.	
CIP Code	CIP code for the approved degree program as listed in the State University System approved degree inventory. Please report the complete 6-digit CIP code in the following format: XX.XXXX.
Program Name (in inventory)	All non-E&G college-credit programs must be reported, including sponsored credit, certificate, and degree programs at all levels. Use the program name as listed in the approved State University System degree inventory for degree programs.
Program Level	Indicate whether the program is offered at the undergraduate or graduate-level.
Program Type	Select the program type for the program - select certificate, bachelor's, master's, specialist, or doctoral.
Local Program Name (if different from inventory name)	If the local program name differs from what is listed in the approved degree inventory, please provide the name used within the university.
Major or Track Name (if different)	Please list each major/track in the degree program as defined in Regulation 8.002 in a separate row.
Program Length	Total minimum number of credit hours required to complete the program.
Tuition Type	Select market rate, self-supporting, or sponsored credit (explain or provide more detail if needed in comments).
Mode of Delivery	Delivery method for program - select face-to-face, hybrid, or online
UBOT Tuition Approval Date	Date program's tuition rate was approved by the University Board of Trustees.
BOG Tuition Approval Date	Date program's tuition rate was approved by the Board of Governors, if applicable
Program Start Date	List the term and year the program began enrolling students - select fall, spring, or summer and input the year using four digits
Tuition Rate Per Credit Hour - Resident	Tuition per credit hour including fees for resident/in-state students.
Tuition Rate Per Credit Hour - Non-Resident	Tuition per credit hour including fees for non-resident/out-of-state students.
Additional Program Fees - Resident	Any required fees specific to the program not included in the tuition per credit hour rate for resident/in-state students, if applicable.
Additional Program Fees - Non-Resident	Any required fees specific to the program not included in the tuition per credit hour rate for non-resident/out-of-state students, if applicable.
Resident Enrollment	Unique headcount of resident students for the academic year most closely aligned with the fiscal year being reported.
Non-Resident Enrollment	Unique headcount of non-resident students for the academic year most closely aligned with the fiscal year being reported.
Degree/Program Completions	Degree or program completions for the academic year most
Revenues	Total revenues from tuition and fees collected by each program
Expenditures	Total expenditures associated with each program for the fiscal
Comparable E&G Program	Does the program have a comparable E&G approved program
Comparable E&G Program - Name	Identify the program name of the comparable E&G program, if
Comparable E&G Program - Level	Identify the Degree Level for the comparable E&G program, if
Comparable E&G Program - CIP	Identify the CIP Code for the comparable E&G program, if one
Program Status	Current status of the program - select active, suspended, teach-
Additional Comments	Any additional information or clarification the institution wishes to

Due date:	10/1/2025
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Note: There is a new data point being collected this year in column AA for program status. See row 28 of the definitions below.

Include the university contact name and email for the staff that completed and approved this file.			
Data provided by:			
Name:	Dacia Larin	E-Mail:	dlarin@uwf.edu
Data approved by:			
Name:	Shelly Blake	E-Mail:	sblake@uwf.edu

Date Approved by the Board of Trustees*:	
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*Submit documentation of Board of Trustees approval in the data request portal along with this completed file.

This is a new data point for this year.

8.002 Self-supporting and Market Tuition Rate Program and Course Offerings.

(1) **Educational Programs and Courses** – All of the educational programs and courses described in this regulation are conducted through the auxiliary enterprise of the university and provide non-state-fundable training, courses, and programs. The two categories of education programs described are self-supporting courses and programs and market tuition rate programs. The three sub-categories of self-supporting education programs and courses are college-credit, non-credit, and sponsored-credit.

- (a) The administrative unit(s) under which all self-supporting and market tuition rate education programs are managed shall be determined by the university.
- (b) All activity for self-supporting and market tuition rate education programs shall be reflected in the auxiliary budget entity, except that activity related to self-supporting sponsored credit courses and programs may be reflected in the contracts and grants trust fund.
- (c) Undergraduate college-credit degree programs shall not be operated as a self-supporting or market tuition rate education program. Undergraduate college-credit certificate programs may be operated as self-supporting so long as the tuition and fees charged for undergraduate college-credit courses offered by a university comply with section 1009.24, Florida Statutes and Board of Governors Regulation 7.001.
- (d) Self-supporting and market tuition rate education programs are not eligible for inclusion in the Southern Regional Education Board's Academic Common Market program.
- (e) For the purposes of this regulation, a program is considered similar if it is offered under the same six-digit CIP code as one funded under the Education and General (E&G) budget entity.

(2) Self-supporting Education Courses and Programs

- (a) **College-Credit Programs** – Self-supporting college-credit certificate programs and graduate-level degree programs that address clearly identified post-professional workforce demand may be implemented subject to the policies and data reporting requirements established in paragraphs (1), (2) and (4) of this regulation.
 - 1. Admissions and graduation criteria, as well as academic standards, for self-supporting graduate-level college-credit degree programs must align with those criteria and standards in equivalent programs funded through the E&G budget entity and must go through the same program approval processes defined in Board of Governors Regulation 8.011 for E&G-funded programs.
 - a. Prior to the implementation of any new self-supporting graduate-level college-credit degree program, documentation must be submitted in a format prescribed by the Chancellor for review. This requirement applies even if the program was previously approved as an E&G program. This requirement

does not apply to self-supporting college-credit certificate programs.

- b. Supporting documentation must include evidence that the new program will not supplant any existing E&G degree offering.

2. If the self-supporting program is a track under an existing E&G program or has a similar existing E&G program, universities must provide students with a side-by-side tuition and fee comparison and maintain this information on their website. This information shall be publicized in catalogs and all other sections of the university's public-facing website that provide information about the program and any non-public websites or applications that provide information about the program. Universities must also provide students with information about financial assistance and obligations for repayment of loans for these programs.

3. Self-supporting graduate-level college-credit degree programs shall not supplant similar, existing university offerings funded by the E&G budget entity. To guarantee access to E&G programs, self-supporting programs will not replace existing E&G programming; thus, a similar E&G program cannot be suspended or terminated in favor of a self-supporting program. Similar E&G programs may only be suspended in extraordinary circumstances per Board of Governors Regulation 8.012. Universities proposing new self-supporting college-credit programs must attest that the similar E&G program will not be closed as a result of the new offering unless prior approval is obtained from the Board of Governors. Enrollment between E&G and self-supporting education offerings may fluctuate over time, depending on demand. However, universities have the responsibility to ensure that the existing E&G offering remains viable in meeting traditional student needs.

4. Self-supporting graduate-level college-credit degree programs shall not include those which lead to initial licensing or certification for occupational areas identified as a state critical workforce need by the Board of Governors unless it can be demonstrated to be the best strategy to increase the number of graduates in the state and has been approved for market tuition rate in accordance with paragraph (3) of this regulation.

5. Tuition and fees charged for all self-supporting college-credit programs must be sufficient to offset the full instructional cost of serving the student and shall not exceed the existing approved tuition and out-of-state fees for similar level courses.

- a. Tuition for self-supporting graduate-level college-credit degree programs must be approved according to the process outlined in Board of Governors Regulation 7.001(4).
- b. Fees for self-supporting graduate-level college-credit degree programs must be established according to the requirements outlined in section 1009.24, Florida Statutes, and Board of

Governors Regulation 7.001. Universities may collect and expend revenues collected above the level needed for cost-recovery of college-credit self-supporting activity when such revenues are used to provide enhanced support for the academic units associated with the courses or programs or to provide financial support to students.

- (b) **Non-credit Courses and Programs** - Non-credit professional development courses and programs designed to upgrade existing technical or professional skills and courses and programs that are provided primarily for personal enrichment or as a public service to the community may be offered as self-supporting education. These courses should not be offered for college credit or count towards any degree requirements.

1. Costs associated with non-college-credit self-supporting education activity must be recovered from student fees or sponsoring entities and shall not be recovered from funds appropriated in the E&G budget entity. Universities may collect and expend revenues collected above the level needed for cost-recovery of non-college-credit self-supporting education activity when such revenues are used to provide enhanced support for the units associated with the courses or programs, support the teaching, research, and service mission of the institution, or provide financial support to students.

- (c) **Sponsored-Credit Courses and Programs** – Sponsored-credit courses and programs are self-supporting college-credit offerings where all the direct costs are paid by an external sponsoring entity. Expenditure of E&G funds for the conduct of the programs is not permitted. No fees or other assessments may be collected from students by the sponsoring entity, the university, or any other entity.

1. In determining whether the direct costs are paid by the sponsoring entity, funds paid directly to the participants in a form such as, but not limited to, stipends, travel, or book allowances should not be taken into account. "Direct costs" refer to the costs associated with the instruction or training that a participant receives. All funds collected from sponsoring entities for sponsored credit courses and programs will be remitted to the university's contract and grants trust fund and/or continuing education auxiliary trust funds as appropriate.

2. Each university board of trustees is authorized to waive any tuition, associated fees, and material and supply fees for students participating in sponsored credit courses and programs when such costs are not covered under the contract with the sponsoring entity and pursuant to a regulation adopted by the university board of trustees under section 1009.26 (9), Florida Statutes, and Board of Governors Regulation 7.008.

- (3) **Graduate-level Market Tuition Rate Programs** – A market tuition rate is defined as a tuition rate that is competitively aligned with comparable programs offered by public or private institutions located both in-state and out-of-state. Market tuition rate programs must be offered at the graduate level only. Market tuition rate will go into

effect the next academic year following approval by the Board of Governors.

(a) A university board of trustees may approve a new graduate-level degree or certificate program for market tuition rate at the time it approves the new degree or certificate for implementation pursuant to Board of Governors Regulation 8.011. The new program proposal must provide a convincing rationale for seeking a market tuition rate, and the proposed budget must clearly indicate that the revenue generated will be sufficient to operate the program without E&G funding. New programs approved for market tuition rate must be submitted to the Board of Governors for consideration and approval of the tuition and any associated fees before enrollment of any students.

(b) A university board of trustees may submit a proposal for market tuition rates for graduate-level courses offered online or through the university's continuing education program when such courses are included as a major of an existing approved degree program or as a college-credit certificate program. Proposals to charge market tuition rates for majors of existing degree programs and college-credit certificate programs shall be considered by the Board if documentation is provided that demonstrates that the following criteria are met.

1. The existing degree program majors and college-credit certificates have been approved in accordance with Regulation 8.011, and the university has established one or more separate market tuition rate student cohorts, each of which can be tracked for administrative and reporting purposes.
2. The program does not lead to initial licensing or certification for occupational areas identified as critical state workforce needs in the most current Florida Board of Governors Strategic Plan. A university may request the establishment of market tuition rates for such programs for non-residents if such programs do not adversely impact the development of other programs for Florida residents. A university, upon a written request for a special exception from the Chancellor, may submit a proposal for market tuition rate for a program leading to initial licensing or certification in a critical state workforce need area if it can be demonstrated to increase the number of graduates in the state.
3. The program admission and graduation requirements shall be the same as similar programs under the same six-digit CIP code funded by the E&G budget entity.
4. If the graduate-level market tuition rate program is a track under an E&G program or has a similar existing E&G program, universities must provide students with a side-by-side tuition and fee comparison and maintain this information on their website. Universities must also provide students with information about financial assistance and obligations for repayment of loans for these programs on their websites. This information shall be publicized in catalogs and all other sections of the university's public-facing website that provide information about the program and any non-public websites or applications that provide

information about the program.

- (c) E&G graduate-level programs should not be suspended or terminated in favor of offering a similar market tuition rate education program.
- (d) The Board shall approve no more than five new graduate-level degree programs or college-credit certificate program proposals per university per academic year.
- (e) The proposal for market tuition rate programs shall be submitted in a format designated by the Chancellor and include, at a minimum, the following information.
 - 1. A description of the program and its compliance with the requirements outlined in Board of Governors Regulation 8.011 (3)(b)1.
 - 2. An explanation of the process used to determine the market tuition rate and the tuition at similar programs from at least five other institutions, including both private and public.
 - 3. A list of similar programs offered by other state university system institutions.
 - 4. A description of how offering the proposed program at a market tuition rate is aligned with the mission of the university.
 - 5. A declaratory statement that offering the proposed program at the market tuition rate does not increase the state's fiscal liability or obligation.
 - 6. The proposed rates for resident and non-resident students in the program. If the proposed rates are different, a description of the rationale shall also be provided.
 - 7. An explanation of any proposed restrictions, limitations, or conditions to be placed on the program.
 - 8. A description of any outcome measures that will be used to determine the success of the proposal.
 - 9. A list of the campuses and/or sites at which the proposed program will be offered.
 - 10. In addition, the following information must be included with the proposal.
 - a. An explanation of how the university will ensure that sufficient courses are available to meet student demand and facilitate the completion of each program submitted for consideration.
 - b. A baseline of current enrollments, including a breakout of resident and non-resident enrollment, in similar courses funded by the E&G budget entity.
 - c. An estimation of the total and net annual revenue the university anticipates collecting if the proposal is approved.
 - d. A description of how revenues will be spent, including whether any private vendors will be utilized. The institution must also identify all of the budget entities used for the program.
- (f) The Board of Governors will act upon the responsible committee's recommendation at the next scheduled meeting. If a university board of trustees' proposal is denied, within five calendar days, the university board

of trustees may request reconsideration by the Board's Tuition Appeals Committee, which shall consist of the Chair of the Board and the Chair of each Board committee. The Tuition Appeals Committee will meet within ten calendar days after the Board of Governors' denial to consider a university board of trustees' request for reconsideration.

- (g) Any proposed increase in tuition and fees for an approved market tuition rate program or certificate must be approved first by the university board of trustees and then the Board of Governors.

(4) Reporting of Self-supporting and Market Tuition Rate Education Information

- (a) Credit hours generated by college-credit courses offered through all self-supporting and market tuition rate education programs shall not be reported as fundable credit hours and shall be reported to the Board of Governors separately from credit hours funded through the E&G budget entity using the State University Database System.
- (b) Degrees awarded for programs offered entirely through self-supporting or market tuition rate education shall be reported to the Board of Governors separately from degrees awarded for programs funded through the E&G budget entity using the State University Data System.
- (c) Institutions must complete an annual report in the format prescribed by the Chancellor and distributed through the data request system on all college-credit self-supporting and market tuition rate education programs. The report must be approved by the institution's board of trustees prior to submission and must include, at a minimum, the following information.
 - 1. The CIP Code and complete name of each program under which each self-supporting and market tuition rate education program is operating. Additionally, all program majors as defined in Board of Governors Regulation 8.011 must be identified.
 - 2. The approval dates for each program's tuition from the university board of trustees and Board of Governors.
 - 3. The approved tuition and fees for each program, including costs per credit hour and any additional fees, such that the total cost to the student for each program may be calculated.
 - 4. The revenues and expenditures for each degree and major within a college-credit self-supporting or market tuition rate education program.
 - 5. Other documentation to demonstrate compliance with this regulation as required.
- (d) Board staff may verify compliance with paragraph (2)(b), self-supporting non-credit courses or programs, as needed.

Authority: Section 7(d), Art. IX, Fla. Const.; Section 1009.24, Florida Statutes;
History—New 09-15-11; Amended 08-31-17, 11-10-22, 05-10-23.

**Board of Trustees
Full Board Meeting
September 18, 2025**

Institutional Neutrality Statement

Recommended Action:

Approval of the Institutional Neutrality Statement

Background Information:

Institutional Neutrality is the principle that colleges and universities should not take official positions on social or political issues unless those issues directly threaten the institution's core mission and its value of free inquiry. The Foundation for Individual Rights and Expression recommends that such discussions should be left to students and faculty (taken from FIRE's website). Many universities have adopted the University of Chicago's Kalven Committee Report or created similar statements. UWF is considering adopting its own statement on institutional neutrality.

Implementation Plan:

Effective upon approval by the Board of Trustees.

Fiscal Implications:

None

Relevant Authority:

BOG 1.001, University Board of Trustees Powers and Duties

Supports Strategic Direction(s):

Strategic Direction 7: Culture of Respect and Civility

Supporting Documents:

1. Institutional Neutrality Document
2. Edits Recommended by the Faculty Senate

Prepared by:

Jaromy Kuhl, Senior Vice President and Provost, Division of Academic Affairs

Presenter:

Jaromy Kuhl, Senior Vice President and Provost

To help the Board of Trustees understand the concept and implications of adopting a position of neutrality, we have compiled several key resources. We have also provided an example statement for UWF.

For information concerning institutional neutrality (what it is, should we consider it, etc), please see the Foundation for Individual Rights and Expression (FIRE) fast facts at <https://www.thefire.org/research-learn/fast-facts-adopting-institutional-neutrality>.

For adopting a statement of institutional neutrality, please see FIRE's statement at <https://www.thefire.org/defending-your-rights/reforming-college-policies/adopting-institutional-neutrality>. You'll also find a link to a list of institutions with an official position of institutional neutrality.

One of the most influential and widely cited statements on institutional neutrality is the University of Chicago's Kalven Committee Report. You'll find the report here: https://provost.uchicago.edu/sites/default/files/documents/reports/KalvenRprt_0.pdf

An example of a statement of neutrality, specific to UWF, can be found below. It is only an example, and it draws upon some language used by the Kalven Committee report.

The [mission](#) of the University of West Florida requires institutional neutrality. Universities play a unique social and cultural role by cultivating, hosting, and teaching both established wisdom and leading thought. In this role, UWF facilitates freedom of academic inquiry and of expression on any subject, which may challenge prevailing social norms, public policies, and institutional practices; however, as an institution devoted to the intellectual pursuit and communication of truth, the university itself takes no official position on public controversies outside its regular activities so as not to undermine the freedom of thought and expression necessary for that endeavor.

Alongside this commitment to free expression and viewpoint diversity, UWF adheres strictly to the free speech and academic freedom requirements of the state and federal constitutions. UWF also reaffirms the right of individual faculty, staff, and students to engage in political discourse and social action as private citizens.

At UWF, dissent and critique belong to the individual faculty member or the individual student. While the university and its academic and administrative units are the settings in which these critiques can flourish, neither the university nor any of its component parts speaks with a single voice or requires one on public controversies. Our common academic purpose is to foster teaching, research, and expression in an environment of open dialogue, free inquiry, individual rights, individual prerogatives, and respect for each individual.

As a public university, UWF may advocate toward the public and toward government bodies and officials on issues related to its stated mission and the means to achieve that mission. Otherwise, only in rare cases, such as when a controversy

threatens the very mission of the university and its values of free inquiry, should the institution actively defend its interests and its values.

The following are edits recommended by the Faculty Senate.

The mission of the University of West Florida requires institutional neutrality. Universities play a unique social and cultural role by cultivating, hosting, ~~and teaching~~ and fostering rigorous academic inquiry across diverse scholarly perspectives and methodological approaches. ~~both established wisdom and leading thought.~~ In this role, UWF facilitates freedom of academic inquiry and of expression on any subject, which may challenge prevailing social norms, public policies, and institutional practices; however, as an institution devoted to the intellectual pursuit ~~and communication of truth,~~ the university itself takes no official position on public controversies outside its regular activities so as not to undermine the freedom of thought and expression necessary for that endeavor.

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Commented [A1]: @hriddell@uwf.edu delete this and replace with by "fostering rigorous academic inquiry across diverse scholarly perspectives and methodological approaches"

Commented [A2]: "evidence-based" could trigger that foundational vs speculative argument. I'm fine with just removing that phrase.

Alongside this commitment to free expression and viewpoint diversity, UWF adheres strictly to the free speech and academic freedom requirements of the state and federal constitutions. UWF also reaffirms the right of individual faculty, staff, and students to engage in political discourse and social action as private citizens.

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~~As a public university, UWF may advocate toward the public, and toward government bodies, and officials on issues related to its stated mission and the means to achieve that mission. Otherwise, only in rare cases, such as when a controversy threatens the very mission of the university and its values of free inquiry, should the institution actively defend its interests and its values.~~

As a public university, UWF may advocate on issues directly related to its educational mission and operational capacity. The university reserves the right to take positions when its core functions of teaching, research, and service are directly threatened or when institutional autonomy, academic freedom, or shared governance principles are under direct attack.

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**Board of Trustees
Full Board Meeting
September 18, 2025**

Rescission of University Policies BOT-03 and BOT-04

Recommended Action:

Approve the rescission of University Policies BOT-03, National Student Exchange Waiver, and BOT-04, Distance Learning Waiver, as presented.

Background Information:

At the request of Chair Matthews, all of the Board of Trustees policies that have not been updated in the past five years are being reviewed. Obsolete policies have been identified for rescission, and each policy was posted for thirty days notifying the UWF community that the policy was being considered for rescission. The following Board of Trustees policies are recommended for rescission for the reasons indicated:

Policy BOT-03, National Student Exchange Waiver Policy, has not been in use for some time. Tuition waivers applicable to international student exchange are outlined in the agreement with each partner institution, thus this policy is obsolete.

The subject matter in BOT-04, Distance Learning Waiver, is addressed in UWF/REG 4.002, Waiver of Tuition and Fees, making the policy redundant and obsolete.

Implementation Plan:

The policies will be rescinded immediately upon approval of the Board.

Fiscal Implications:

None

Relevant Authority:

Florida BOG Regulation 1.001, University Board of Trustees Powers and Duties

Supports Strategic Direction(s):

Strategic Direction 6, Operational Excellence

Supporting Documents:

1. BOT-03, National Student Exchange Waiver – rescind
2. BOT-04, Distance Learning Waiver – rescind

Prepared by:

Office of the General Counsel

Presenter:

Julie Sheppard, Interim General Counsel



Policy

Board of Trustee Policy **BOT-03.00-02/05**

TO: The University of West Florida Community

FROM: Dr. John Cavanaugh, President

SUBJECT: National Student Exchange Waiver Policy
Effective Academic Year 2005/2006

Responsible Office: Enrollment Services

Policy/Purpose: This policy is being proposed to encourage increased undergraduate enrollment and diversity at UWF through the National Student Exchange program.

National Student Exchange Waiver Policy

The UWF Coordinator for the National Student Exchange program will identify which students are eligible for the NSE waiver consistent with the following guidelines:

1. NSE waivers of out-of-state tuition may be granted for non-Florida resident undergraduate students who are enrolled through the NSE program under Plan A at UWF.
2. The number and value of the NSE waivers authorized pursuant to this policy will be accounted for separately from other types of waivers and the effectiveness of this policy to achieve the objectives will be reviewed by the Provost/designee annually. These waivers are in addition to and independent of the undergraduate waiver allocations.
3. The Provost/designee has the authority to set a cap on the number of or maximum value of the NSE waivers awarded per semester.

Approved by University of West Florida Board of Trustees on February 25, 2005.



Policy

Board of Trustee Policy BOT-04.00-06/04

TO: The University of West Florida Community

FROM: Dr. John Cavanaugh, President

SUBJECT: Distance Learning Waiver

Responsible Office: Academic Technology Center

Policy/Purpose: This policy enables UWF to successfully recruit out-of-state students into its distance learning programs and encourages increased enrollment (including military personnel) in the distance learning academic degree programs offered at UWF.

Distance Learning Waiver Policy:

The Provost/Designee will identify the online degree(s) and/or certificate program(s) in which the students must be enrolled to be eligible for the Distance Learning Waiver consistent with the following guidelines:

1. Distance Learning Waivers may be granted for non-Florida resident students for enrollment in distance learning courses in a designated degree(s) and/or certificate program(s) ("designated degrees or programs").
2. To be considered for a Distance Learning Waiver, the student must be officially enrolled in one of the designated degrees or programs. This enrollment may be as
 - a. a degree-seeking student or
 - b. a non-degree seeking student specifically sanctioned by the offering department.
 - Note: A special section of the course will be designated as Distance Learning where CEC will be coded on the RSCO screen under Program 1.
3. The number and value of the Distance Learning Waivers authorized pursuant to this policy will be accounted for separately from other types of waivers and the effectiveness of this policy to achieve the objectives will be reviewed by the Provost/designee annually. These waivers are in addition to and independent of the undergraduate and graduate waiver allocations.
4. The Provost/designee will review all Distance Learning Waivers for approval and the Provost/designee has the authority to set a cap on the number of or maximum value of the Distance Learning Waivers awarded per semester.
5. The Distance Learning Waivers for each course will be approved only when the issuance of such waivers will not result in additional E&G costs to the University. The Provost/designee has the authority to determine whether the Distance Learning Waivers for each course will be partial waivers or full waivers of the out-of-state fee. The Provost/designee also has the authority to approve any Off Campus Fees to be charged to students to recover the increased costs to the University that are incurred in the delivery of the course off campus.

6. Provost staff will provide semester reports to the Provost/designee and Deans on Distance Learning Waivers issued during each semester.

Eligible Programs:

Eligible programs must be authorized by the Provost/designee.

Approved by University of West Florida Board of Trustees on June 17, 2004.

TO BE RESCINDED

Board of Trustees
Full Board Meeting
September 18, 2025

Approval to Seek New Institutional Accreditor

Recommended Action:

Approve the request to seek accreditation with the Higher Learning Commission (HLC).

Background Information:

Section 1008.47, the Florida Statutes and BOG Regulation 3.006 (2)(a) require Florida public institutions of higher education to “seek and take action to establish and maintain institutional accreditation with an agency or association recognized by the United States Department of Education.”

This move is possible due to a change in federal regulations. In 2020, the US Department of Education (ED) removed the geographic restrictions associated with accreditation of higher education institutions in the United States. As a result, institutions were permitted to seek accreditation with a federally recognized institutional accreditor from outside their geographic region. There are six federally recognized institutional accreditors, including the university’s current institutional accreditor, the Southern Association of Schools and Colleges Commission on Colleges (SACSCOC) and the Higher Learning Commission (HLC). The Code of Federal Regulations 34 CFR 600.11 and GEN-25-03 provide the most recent guidance on the process of changing institutional accreditors.

UWF had a successful site visit in February 2025 with no findings or recommendations from the on-site committee and expects a favorable reaffirmation vote at the SACSCOC Board of Trustees meeting in December 2025 reaffirming UWF’s accreditation for another ten-year period. The favorable reaffirmation vote from SACSCOC allows UWF to begin the process of seeking accreditation with HLC in compliance with Section 1008.47 of the Florida Statutes. The process for changing institutional accreditation agencies begins with approval by the UWF Board of Trustees to pursue membership with another institutional accreditor selected by the university.

Next, the institution submits a Reasonable Cause Request Certification to the US Department of Education (ED) which states the reason for changing accreditors along with an institutional certification that UWF is in good standing with its current accreditor, SACSCOC. If approved by the UWF Board of Trustees and the ED, the institution will begin the application process with the Higher Learning Commission (HLC).

The reasons for requesting to change to HLC as recognized by ED include the following:

1. Better alignment of accreditation standards
2. Strengthening institutional quality
3. Statutory requirement to change

The timeframe for changing accreditors depends upon several factors that include ED approval, the preparation and submission of materials by the institution, and the subsequent review by HLC

staff and peer reviewers. It is anticipated that following the review and approval by ED, it may take 18 to 24 months to obtain membership with HLC.

Implementation Plan:

September 18, 2025 – UWF BOT considers approval of seeking a new institutional accreditor.

October 2025 – UWF submits a Reasonable Cause Request Certification to ED.

November 2025 - UWF receives permission to change accreditors from ED.

December 2025 – SACSCOC reaffirms accreditation for UWF.

January 2026 – UWF submits an Application for Initial Accreditation to HLC.

April 2026 – UWF begins the Preliminary Peer Review process with HLC.

June 2027 – HLC Peer Review committee conducts site visit at UWF.

November 2027 – HLC Board of Trustees considers initial accreditation for UWF.

December 2027 – UWF notifies the US Department of Education of accreditation with HLC.

January 2028 – UWF resigns accreditation with SACSCOC.

Fiscal Implications:**FY 2025-26 Estimates**

\$5,000 – Application fee due January 2026 to HLC

\$10,000 – Preliminary Peer Review due March 2026 to HLC

FY 2026-27 Estimates

\$14,550 + Committee Expenses – Comprehensive Peer Review with Site Visit due June 2027

Relevant Authority:

Code of Federal Regulations 34 CFR 600.11 (Special Rules Regarding Institutional Accreditation or Preaccreditation)

Section 1008.47, Florida Statutes (Postsecondary Education Institution Accreditation)

Board of Governors Regulation 3.006 (Accreditation)

U.S. Department of Education Guidance for Institutions Seeking to Change or Add Accrediting Agencies (GEN-25-03)

Supports Strategic Direction(s):

Strategic Direction 3: Exceptional Academic Programming and Scholarship Aligned with State Needs, Strategic Direction 4: Community and Economic Engagement, and Strategic Direction 6: Operational Excellence

Supporting Documents:

1. Reasonable Cause Request Certification.
2. Code of Federal Regulations 34 CFR 600.11 (Special Rules Regarding Institutional Accreditation or Preaccreditation)
3. Section 1008.47, Florida Statutes (Postsecondary Education Institution Accreditation)
4. Board of Governors Regulation 3.006 (Accreditation)
5. U.S. Department of Education Guidance for Institutions Seeking to Change or Add Accrediting Agencies (GEN-25-03)

Prepared by:

Dr. Angela Bryan, Accreditation Liaison Officer and Director of Institutional Effectiveness,

Presenter:

Dr. Dallas Snider, Vice Provost, Academic Affairs



Reasonable Cause Request Certification

Directions: Please complete and submit this certification as part of requesting a change of accrediting agencies or multiple accreditation. Please submit this certification request to the CaseTeams@ed.gov.

Section 1: Identifying Information

1. Name of institution: **The University of West Florida**
2. OPE ID: **00395500**
3. Submitting official: **Angela Bryan**
4. Title: **Director of institutional Effectiveness & Accreditation Liaison Office**
5. Email: **abryan@uwf.edu**
6. Phone: **850-332-1384**

Section 2: Reasonable Cause Change Request

1. ☒ Change of Primary Accrediting Agencies ☐ Multiple Accreditation
2. Name of accrediting agency from which you seek to change or add:
Southern Association of Colleges and Schools Commission on Colleges
3. Date of the last renewal of accreditation: **December 6, 2015**
4. ☒ I have attached the most recent accreditation renewal decision letter with submission of this document.
5. Date that the institution's accreditation is set to expire: **December 31, 2025**
6. Name of proposed new or added accrediting agency: **Higher Learning Commission**
7. *If multiple accreditation,*
 - a. Which agency will be the primary accrediting agency if the application for multiple accreditation is approved?
8. Reasons for changing accrediting agencies or adding multiple accreditation (check all that apply):
 - ☐ financial
 - ☐ expanding program offerings
 - ☒ better alignment of accreditation standards
 - ☒ strengthening institutional quality
 - ☐ mission
 - ☐ credential offering
 - ☒ statutory requirement to change
 - ☐ other:



Section 3: Institutional Certification

1. ☒ The institution certifies it has NOT had its accreditation withdrawn, revoked, or otherwise terminated for cause during the preceding 24 months.
2. ☒ The institution certifies it has NOT been subject to a probation or equivalent, show cause order, or suspension order during the preceding 24 months.
3. ☒ The institution acknowledges that it may not disburse Title IV funds to any students enrolled in programs that are not within the new agency's scope of recognition by the Department.

Section 4: Institutional Signature

1. Signature:
2. Name institution official: **Manny Diaz Jr.**
3. Title of institution official: **Interim President**
4. Date:

To the best of my knowledge and belief, I certify that all information in this Reasonable Cause Certification Request is true and correct. I acknowledge that failure to submit true and correct information, or failure to remain in compliance with the change of accrediting agency requirements or maintain multiple accreditation, as applicable, may result in liability under the False Claims Act, 31 U.S.C. § 3729, *et seq.*; OMB Guidelines to Agencies on Governmentwide Debarment and Suspension (Nonprocurement) in 2 C.F.R. part 180, as adopted and amended as regulations of the Department in 2 C.F.R. part 3485; and 18 U.S.C. § 1001, as appropriate, and/or other enforcement actions.

Section 5: Department Approval

Based on the forgoing submissions, the institution has met the requirements of 34 CFR 600.11 and its request to:

- ☐ change accrediting agencies
☐ maintain multiple accreditation

Additional Comments:

1. Signature:
2. Name of agency official:
3. Title of agency official:
4. Date:

This content is from the eCFR and is authoritative but unofficial.

Title 34 — Education

Subtitle B — Regulations of the Offices of the Department of Education

Chapter VI — Office of Postsecondary Education, Department of Education

Part 600 — Institutional Eligibility Under the Higher Education Act of 1965, as Amended

Subpart A — General

Source: 59 FR 22336, Apr. 29, 1994, unless otherwise noted.

Authority: 20 U.S.C. 1001, 1002, 1003, 1088, 1091, 1094, 1099b, and 1099c, unless otherwise noted.

Source: 53 FR 11210, Apr. 5, 1988, unless otherwise noted.

§ 600.11 Special rules regarding institutional accreditation or preaccreditation.

(a) *Change of accrediting agencies.*

- (1) For purposes of §§ 600.4(a)(5)(i), 600.5(a)(6), and 600.6(a)(5)(i), the Secretary does not recognize the accreditation or preaccreditation of an otherwise eligible institution if that institution is in the process of changing its accrediting agency, unless the institution provides the following to the Secretary and receives approval:
 - (i) All materials related to its prior accreditation or preaccreditation.
 - (ii) Materials demonstrating reasonable cause for changing its accrediting agency. The Secretary will not determine such cause to be reasonable if the institution—
 - (A) Has had its accreditation withdrawn, revoked, or otherwise terminated for cause during the preceding 24 months, unless such withdrawal, revocation, or termination has been rescinded by the same accrediting agency; or
 - (B) Has been subject to a probation or equivalent, show cause order, or suspension order during the preceding 24 months.
- (2) Notwithstanding paragraph (a)(1)(ii) of this section, the Secretary may determine the institution's cause for changing its accrediting agency to be reasonable if the agency did not provide the institution its due process rights as defined in § 602.25, the agency applied its standards and criteria inconsistently, or if the adverse action or show cause or suspension order was the result of an agency's failure to respect an institution's stated mission, including religious mission.

- (b) **Multiple accreditation.** The Secretary does not recognize the accreditation or preaccreditation of an otherwise eligible institution if that institution is accredited or preaccredited as an institution by more than one accrediting agency, unless the institution—
- (1) Provides to each such accrediting agency and the Secretary the reasons for that multiple accreditation or preaccreditation;
 - (2) Demonstrates to the Secretary reasonable cause for that multiple accreditation or preaccreditation.
 - (i) The Secretary determines the institution's cause for multiple accreditation to be reasonable unless the institution—

- (A) Has had its accreditation withdrawn, revoked, or otherwise terminated for cause during the preceding 24 months, unless such withdrawal, revocation, or termination has been rescinded by the same accrediting agency; or
 - (B) Has been subject to a probation or equivalent, show cause order, or suspension order during the preceding 24 months.
- (ii) Notwithstanding paragraphs (b)(2)(i)(A) and (B) of this section, the Secretary may determine the institution's cause for seeking multiple accreditation or preaccreditation to be reasonable if the institution's primary interest in seeking multiple accreditation is based on that agency's geographic area, program-area focus, or mission; and
- (3) Designates to the Secretary which agency's accreditation or preaccreditation the institution uses to establish its eligibility under this part.

(c) *Loss of accreditation or preaccreditation.*

- (1) An institution may not be considered eligible for 24 months after it has had its accreditation or preaccreditation withdrawn, revoked, or otherwise terminated for cause, unless the accrediting agency that took that action rescinds that action.
- (2) An institution may not be considered eligible for 24 months after it has withdrawn voluntarily from its accreditation or preaccreditation status under a show-cause or suspension order issued by an accrediting agency, unless that agency rescinds its order.

(d) *Religious exception.*

- (1) If an otherwise eligible institution loses its accreditation or preaccreditation, the Secretary considers the institution to be accredited or preaccredited for purposes of complying with the provisions of §§ 600.4, 600.5, and 600.6 if the Secretary determines that its loss of accreditation or preaccreditation—
 - (i) Is related to the religious mission or affiliation of the institution; and
 - (ii) Is not related to its failure to satisfy the accrediting agency's standards.
- (2) If the Secretary considers an unaccredited institution to be accredited or preaccredited under the provisions of paragraph (d)(1) of this section, the Secretary will consider that unaccredited institution to be accredited or preaccredited for a period sufficient to allow the institution to obtain alternative accreditation or preaccreditation, except that period may not exceed 18 months.

(Authority: 20 U.S.C. 1099b)

[59 FR 22336, Apr. 29, 1994, as amended at 85 FR 58916, Nov. 1, 2019]



Select Year: 2024 ▼ Go

The 2024 Florida Statutes (including 2025 Special Session C)

[Title XLVIII](#)[Chapter 1008](#)[View Entire Chapter](#)

EARLY LEARNING-20 EDUCATION CODE ASSESSMENT AND ACCOUNTABILITY

1008.47 Postsecondary education institution accreditation.—

(1) **DEFINITION.**—As used in this section, the term “postsecondary education institution” means a Florida College System institution, state university, or nonpublic postsecondary education institution that receives state funds.

(2) **ACCREDITATION.**—

(a) By September 1, 2022, the Board of Governors or the State Board of Education, as applicable, shall identify and determine the accrediting agencies or associations best suited to serve as an accreditor for public postsecondary institutions. Such accrediting agencies or associations must be recognized by the database created and maintained by the United States Department of Education. In the year following reaffirmation or fifth-year review by its accrediting agencies or associations, each public postsecondary institution must seek and obtain accreditation from an accrediting agency or association identified by the Board of Governors or State Board of Education, respectively, before its next reaffirmation or fifth-year review date. The requirements in this section are limited to a one-time change in accreditation. The requirements of this subsection are not applicable to those professional, graduate, departmental, or certificate programs at public postsecondary institutions that have specific accreditation requirements or best practices, including, but not limited to, law, pharmacy, engineering, or other similarly situated educational programs.

(b) Once a public postsecondary institution is required to seek and obtain accreditation from an agency or association identified pursuant to paragraph (a), the institution shall seek accreditation from a regional accrediting agency or association and provide quarterly reports of its progress to the Board of Governors or State Board of Education, as applicable. If each regional accreditation agency or association identified pursuant to paragraph (a) has refused to grant candidacy status to an institution, the institution must seek and obtain accreditation from any accrediting agency or association that is different from its current accrediting agency or association and is recognized by the database created and maintained by the United States Department of Education. If a public postsecondary institution is not granted candidacy status before its next reaffirmation or fifth-year review date, the institution may remain with its current accrediting agency or association.

(c) This subsection expires December 31, 2032.

(3) **PROHIBITION.**—An accrediting agency or association may not compel any public postsecondary institution to violate state law, and any adverse action upon the institution based upon the institution’s compliance with state law constitutes a violation of this section that may be enforced through subsection (4), except to the extent that state law is preempted by a federal law that recognizes the necessity of the accreditation standard or requirement.

(4) **CAUSE OF ACTION.**—A postsecondary education institution negatively impacted by retaliatory or adverse action taken against the postsecondary education institution by an accrediting agency or association may bring an action against the accrediting agency or association in a court of competent jurisdiction and may obtain liquidated damages in the amount of federal financial aid received by the postsecondary education institution, court costs, and reasonable attorney fees.

(5) **EXPIRATION.**—This section expires December 31, 2032.

History.—s. 4, ch. 2022-70; s. 171, ch. 2023-8; s. 11, ch. 2023-82.

3.006 Accreditation.

- (1) Each university board of trustees shall develop policies on accreditation that are consistent with the institution's mission and Board of Governors' guidelines.
- (2) Institutional Accreditation
 - (a) Consistent with section 1008.47, Florida Statutes, each institution shall seek and take action to establish and maintain institutional accreditation with an agency or association recognized by the United States Department of Education.
 - (b) Each president shall inform the Chancellor within ten business days upon verbal or written notification of any concern, scheduled visit, or any action taken by the institution's accrediting agency or association related to the institution's compliance certification or interim report.
 - (c) Each institution shall provide a copy of the certification letter for initial accreditation or accreditation reaffirmation to the Board of Governors immediately upon receipt from the accrediting agency or association.
 - (d) Upon request, an institution shall provide the Board of Governors' office with a copy of any institution's response to its accrediting agency or association.
- (3) Discipline-Specific Accreditation
 - (a) Each institution is encouraged to seek and take action to maintain national or discipline-specific accreditation for its colleges, schools, and academic programs for which there are established standards for programmatic accreditation.
 - (b) Discipline-specific accreditation is required for academic programs in which graduation from an accredited program is a prerequisite to achieving licensure or certification for professional practice.
 - (c) Each institution must provide notification to the university board of trustees and the Chancellor within ten business days when an accredited academic program is placed on warning or probation or when the accreditation status is revoked by a discipline-specific accrediting body. The notification must include a report of any adverse accreditation findings provided by the discipline-specific accrediting body that outlines the basis for the change in accreditation status.

Authority: Section 7(d), Art. IX, Fla. Const., Section 1008.47, Florida Statutes; History—Formerly 6C-2.57 and 6C-3.06, 11-18-70, 12-17-74, 8-11-85, Amended and Renumbered 1-29-09, Amended 1-22-15, 1-25-23.

Federal Student Aid

An OFFICE of the U.S. DEPARTMENT of EDUCATION

Published on <https://fsapartners.ed.gov/knowledge-center/library/dear-colleague-letters/2025-04-30/changes-approval-process-changing-accrediting-agencies>

PUBLICATION DATE: May 01, 2025

DCL ID: GEN-25-03

SUBJECT: Changes to the Approval Process for Changing Accrediting Agencies


SUMMARY: This document provides guidance on changing accrediting agencies and supersedes GEN-22-10 and GEN-22-11.

Dear Colleague:

Currently, under section 496(h) of the Higher Education Act of 1965, as amended, (HEA) (20 U.S.C. 1099b(h)), an institution seeking to change its accrediting agency must submit all materials relating to the prior accreditation and materials demonstrating reasonable cause for changing the accrediting agency to the Secretary. The Department has implemented this statutory requirement via 34 CFR § 600.11, which requires an institution to provide all materials related to its prior accreditation or preaccreditation and materials demonstrating reasonable cause for changing its accrediting agency (or having multiple accrediting agencies), so that the Department can provide approval of the switching or adding of the accrediting agencies. The law and regulation do not dictate a robust or onerous process for receiving the Department's approval for a change in accrediting agencies or maintaining multiple accreditation. Therefore, consistent with statutory and regulatory obligations, the Department will conduct expeditious review of applications received except in rare cases where an institution lacks a reasonable cause for making a change.



Additionally, neither the law nor the regulation disincentivizes or prohibits an institution from changing an accrediting agency or choosing to have multiple accrediting agencies. Department guidance should therefore allow institutions the freedom to develop unique partnerships with accrediting agencies. This includes any decision to change an accrediting agency because of an institution's religious mission, shift in academic program offerings, compliance with a state law, desire to set stronger academic standards, or any other justifiable desire of the institution. Institutions have discretion to choose an accrediting agency, and the agency has the sole discretion whether to grant accreditation. The Department's lone interest in this matter relates to ensuring the institution is not switching accrediting agencies as a means of avoiding adherence to the Department's laws and regulations.

Accordingly, this announcement restates the basic obligations under 34 CFR § 600.11 for an institution to receive approval and clarifies where the Department does not have the authority to withhold an approval. As such, this guidance supersedes earlier guidance provided on this subject in GEN-22-10 and GEN-22-11.

As soon as possible when an institution begins the process of obtaining a new accrediting agency an institution should notify the Department in writing of its intent to change its primary accrediting agency or to add a new accrediting agency. Institutions should submit this [Reasonable Cause Request Certification](#)  to the Department which will serve as documentation of its prior accreditation, and materials demonstrating reasonable cause for changing or adding an accrediting agency to comply with 34 CFR § 600.11(a) or (b). The Department will find the cause to be reasonable and approve a change in accrediting agency, or adding an accrediting agency, if an institution submits all materials related to its prior accreditation or preaccreditation, as required by 34 CFR § 600.11(a)(1) and 34 CFR § 600.11(b), and it does not fall under the prohibitions in 34 CFR § 600.11(a)(1)(ii) or 34 CFR § 600.11(b)(2)(i). Accordingly, the Department will determine an institution's cause not to be reasonable if the institution:

- Has had its accreditation withdrawn, revoked, or otherwise terminated for cause during the preceding 24 months, unless such withdrawal, revocation, or termination has been rescinded by the same accrediting agency.
- Has been subject to a probation or equivalent, show cause order, or suspension order during the preceding 24 months.

Notwithstanding the foregoing, under 34 CFR § 600.11(a)(2), the Department may determine the institution's cause for changing its accrediting agency to be reasonable if the prior agency did not provide the institution its due process rights as defined in 34 CFR § 602.25, the agency applied its standards and criteria inconsistently, or if the adverse action, probation, show cause, or suspension order was the result of an agency's failure to respect an institution's stated mission, including its religious mission. In addition, under 34 C.F.R. § 600.11(b)(2)(ii), even if the institution is or has been subject to one of the negative actions described in (b)(2)(i), the Department may determine the institution's cause for seeking multiple accreditation or preaccreditation to be reasonable if the institution's primary interest in seeking multiple accreditation is based on that agency's geographic area, program-area focus, or mission.

Since the July 1, 2020, implementation of the Trump administration regulatory changes, which received consensus from negotiators, nationally recognized accrediting agencies can choose to conduct accrediting activities across the United States and institutions are free to select an agency whose geographic scope previously did not include the State in which the institution is located (see 34 CFR 602.11). State legislatures have taken action to ensure accrediting agencies do not place undue influence over institutions and that public institutions are free to seek a new accrediting agency (see recent changes to [Florida law](#)  and [North Carolina law](#) .

State legislatures and governors have legitimate authority to manage their public institutions and under the Department of Education Organization Act, the Department has no power to interfere with that authority reserved to the States under 34 CFR 602.11 (see 20 USC 3403(a)). Because of this, if the institution otherwise meets the requirements set out in law and regulation, in these cases the Department will determine that an institution has reasonable cause and therefore approve a change in accrediting agency for institutions that are required to do so based on State action. The HEA established the program integrity triad, balancing authority with regard to eligibility for Title IV funding across each member of the triad: States, accrediting agencies, and the Department. Congress has directed the Department to review and recognize accrediting agencies, but those agencies have the role of accrediting institutions and/or programs. The Department has no authority to substantively intervene in the decision of an institution or program to select a particular accrediting agency (or to intervene with a State to direct its public institutions to seek a new accrediting agency). The Department has the obligation to ensure accrediting agencies hold institutions accountable in accordance with the requirements of the HEA, but it may not invent new authorities for itself beyond this.

The Department also recognizes the significance of voluntary membership in accrediting agencies as required under 34 CFR § 602.14(a) but does not believe that an institution's change in accrediting agency due to State law compliance constitutes an involuntary membership. In fact, because accrediting agencies are no longer bound by regions in regulation, institutions have more options to choose from in seeking voluntary membership with accrediting agencies across the country.

In all cases, it is incumbent on the institution to provide accurate documentation and materials to demonstrate the reasonableness of the change or multiple accreditation. If the Department does not approve a change in accrediting agency within 30 days of the date of its receipt of a complete notice of this change and materials demonstrating reasonable cause, approval will be deemed to have been granted, unless the change or multiple accreditation is prohibited as described above.

Again, the law and regulation describe the requirements regarding what constitutes reasonable cause for changing an accrediting agency. It is not the Department's prerogative to infer any other meanings from the basic requirements or contrive a multi-step investigation. This guidance re-establishes a simple process that will remove unnecessary requirements and barriers to institutional innovation.

Other than existing statutory and regulatory requirements stated in the document, the contents of this guidance do not have the force and effect of law and are not meant to bind the public. This document is intended only to provide clarity to the public regarding existing requirements under the law or agency policies.

Sincerely,

James P. Bergeron Deputy Under Secretary, Acting Under Secretary

Delegated to Perform the Functions and Duties of the Under Secretary and the Assistant Secretary for Postsecondary Education

**Board of Trustees
Full Board Meeting
September 18, 2025**

Revisions to UWF Regulation 5.001 Parking and Registration

Recommended Action:

Approve the revisions to UWF Regulation 5.001 Parking and Registration contingent upon no substantive changes following the conclusion of the posting period.

Background Information:

This regulation was last updated in December of 2021. The revised UWF Regulation 5.001 modernizes and clarifies the University's parking policies to reflect operational updates, improve clarity, and streamline enforcement. Major updates and notable provisions are summarized below:

Key Changes and Enhancements

- **Transition to Virtual Permits:**
 - Physical decals and hangtags have been replaced with *virtual permits*, using vehicle license plates for verification.
 - One permit may cover up to three vehicles (but only one can be on campus at a time).
- **Permit Access and Fee Structure:**
 - Permit types and fees remain the same (e.g., Faculty/Staff: \$145; Commuter: \$114; Resident: \$145).
 - Permits are available online via the Parking Portal through MyUWF.
 - Satellite and off-campus students must purchase permits if attending classes on the main campus.
- **Updated Parking Designations:**
 - Business hours defined as 7:00 a.m. to 5:30 p.m., Monday–Friday.
 - Permit restrictions are enforced during business hours; after hours, most lots open to all permit holders (with exceptions for Resident, Visitor, and Reserved spaces).
 - Resident lots are restricted 24/7 to valid resident permits.
- **Expanded Temporary Permit Use:**
 - Temporary virtual permits are available for visitors, borrowed vehicles, satellite campus students, off-campus employees, and retired staff.
- **Enhanced Regulation of License Plate Visibility:**
 - Plates must be visible to the travel lane; back-in parking is prohibited unless the plate is front-mounted.
- **New Parking Designation: Pregnant Employee Permit:**
 - Introduced in compliance with the *Pregnant Workers Fairness Act*.
 - Employees may request temporary parking accommodation through Human Resources.

Enforcement and Fines

- **Citation and Appeals Process:**
 - Two-level appeal system: Level One (Parking Services), Level Two (Parking Violations Appeal Board).

- Certain appeal reasons (e.g., “couldn’t find a space” or “late for class”) are explicitly invalid.
- **Fines and Penalties:**
 - Fines updated and clarified; maximum fines include \$100 for unauthorized use of handicap or fire lane spaces.
 - Failure to display plate to travel lane now explicitly fined (\$25).
 - Parking in new Pregnant Employee spaces without authorization incurs a \$100 fine.
- **Immobilization and Towing:**
 - Escalating immobilization fees for repeat offenders (\$50 → \$100 → \$150 with loss of privileges).
 - Towing costs are charged to the permit holder or vehicle owner.

Visitor Access and Public Transportation

- Visitors continue to receive free temporary permits and must park in designated areas.
- Trolley service encouraged as a parking alternative; transportation access fees remain (\$8/credit hour for students; \$6.50/year for employees).

Update since August 14, 2025, Finance, Facilities, and Operations Committee Meeting

- The updated revision introduces a special Back-In Permit, allowing patrons to back into surface lot spaces. A Back-in Permit (hang tag) will be issued at a cost of \$25 per year in addition to a valid campus parking permit. With implementation in January 2026, this fee will be \$12.50. A \$25 fine would be assessed for vehicles backing in without the special permit.

Implementation Plan:

UWF/Reg. 5.001 Parking and Registration, will become effective upon approval by the UWF BOT.

Fiscal Implications:

Fiscal Impact Statement: Parking Regulation Update & Virtual Permitting Implementation

The update to UWF’s parking and registration regulation and the transition to a virtual license plate recognition (LPR) system are designed to enhance operational efficiency, reduce administrative overhead, and improve the user experience. The transition to virtual parking permits represents a strategic modernization of campus operations.

While the University will incur one-time implementation costs of approximately \$110,000—including cameras, software, system integration, and training—the shift is expected to be cost-neutral within 3 to 5 years.

Ongoing operating costs are estimated at \$20,000 annually for system maintenance and cloud services. However, these are offset by projected annual savings of \$25,000 due to the elimination of expenses related to physical permits (e.g., printing, mailing, and inventory management).

The Back-In Parking Permit, priced at \$25 per year, is projected to generate limited revenue, with participation expected at fewer than 50 individuals. Estimated annual revenue would therefore be under \$1,250. Similarly, violations for unauthorized back-in parking would result in a \$25 citation per infraction.

For context, the entire State University System issued 192 back-in permits in FY 2024–25 across three universities, further supporting the expectation of low participation at UWF. While the financial impact is limited, the hang tag provides an option that addresses user concerns and enhances flexibility in parking operations.

Overall, this change enhances efficiency, improves the user's experience, and aligns with sustainable practices, all with minimal long-term financial impact.

Relevant Authority:

Sections 1006.66, 1009.24, and 1009.26, Florida Statutes
BOG Regulation 7.003 (11), Fees, Fines and Penalties

Supports Strategic Direction(s):

Strategic Direction 6: Operational Excellence

Supporting Documents:

1. UWF/REG 5.001 Parking and Registration-redline
2. UWF/REG 5.001 Parking and Registration-clean
3. BOG Regulation 7.003 (11) Fees, Fines and Penalties

Prepared by:

- Chip Chism, Parking Director, ichism@uwf.edu
- James Adams, Executive Director Business & Auxiliaries, jadams1@uwf.edu
- Betsy Bowers, Vice President, Finance & Administration, bbowers@uwf.edu

Presenter:

Betsy Bowers, Vice President of the Division of Finance and Administration



Number: UWF/REG 5.001
Title: Parking and Registration **2021**
Responsible
Department: Parking and Transportation Services

~~I. General Statement:~~

~~A. General Information~~

~~The University of West Florida strives to provide a safe environment for employees, students and visitors and to provide facilities required for personal safety and health. Parking a vehicle on any of the University of West Florida's campuses is a privilege that may be granted and revoked by the University. The University is authorized and reserves the right to regulate its vehicle parking facilities for the exclusive use of designated groups or individuals. All vehicles parked on campus are parked at the risk of the owner. The University does not assume liability for vehicles or items left in the vehicles. The text of this rule is on the web page at <http://uwf.edu/generalcounsel>~~

~~B. Registration~~

~~All University employees, students and others, with the exclusion of visitors, using automobiles and other mechanical conveyances on campus must be registered with Parking Services the first day the vehicle is on campus. For registration to be considered valid, the permit, if it is a decal, must be properly affixed to the lower left corner of the rear windshield or, if it is a hang tag, must be in the designated place and upright;~~

~~C. Permits~~

- ~~1. By parking on campus, employees, students and others are agreeing to abide by and follow all provisions contained in this rule.~~
- ~~2. Permits may be purchased online by logging into my.uwf.edu, and searching "parking." Fort Walton Beach campus permits are invalid on the University of West Florida's Pensacola campus. The fees for permits are set forth below:~~

~~ANNUAL PERMIT FEES~~

Reserved/Admin	\$363
Faculty/Staff	\$145
Resident	\$145
Commuter	\$114
Motorecycle	\$73

~~Semester permits are ½ the annual permit price. Permit price includes applicable Florida Sales tax.~~

- ~~3. Permits are issued for an academic year or semester. Permits or temporary permits must be immediately placed on the vehicle according to the instructions on the back of the permit.~~
- ~~4. Purchasing a permit does not guarantee a parking space.~~
- ~~5. Vehicle registration expiration dates appear on each issued permit.~~
- ~~6. Expired permits must be removed from the vehicle. Only one permit is allowed per vehicle.~~
- ~~7. Permit holders will be held responsible for violations that are committed by other persons using the permit of the permit holder.~~
- ~~8. Permits will not be issued to or renewed for individuals with any delinquent parking citations. All fines must be paid before a permit will be issued.~~
- ~~9. Each vehicle must display a valid parking permit at all times.~~
- ~~10. Upon sale or disposal of a registered vehicle, the permit must be destroyed.~~
- ~~11. Replacement permits are issued for a fee in the following cases:~~
 - ~~a. When a registered vehicle is no longer being used on campus and/or is replaced by a different vehicle (proof of registration must be furnished); or~~
 - ~~b. When the permit of a registered vehicle is lost, stolen or defaced and an appropriate complaint is filed with the police (proof of prior registration must be furnished).~~

~~D. Permits~~

~~Each vehicle parking on campus must display a parking permit at all times. Hang tags are transferrable to another vehicle owned by and registered to the same individual. However, no permit is transferable to another individual. Hang tags must be hung from the rearview mirror so that they are visible. Placing the hangtag on the dash or console will be~~

~~considered an improper display. The color of the permit will designate the specific parking areas allowed.~~

~~E. Permit Designations~~

~~1. Residential~~

~~Resident students are required to display the appropriate University resident permit. The permit must be displayed at all times the vehicle is on campus. Resident students must park in appropriate parking areas at all times the vehicle is parked on campus. Between the hours of 7:00 a.m. and 4:30 p.m., Resident students must park in blue or black lots in accordance with the color of their permit. Between the hours of 4:30 p.m. and 7:00 a.m. Resident students may also park in commuter and faculty and staff areas. After 5:30 p.m. all vehicles, including those of Resident students, with valid parking permits may park in any numbered reserved space. Resident students moving from one residence hall to another must purchase the appropriate permit and return the old permit to parking services in bldg. 20W.~~

~~2. Visitor~~

~~Visitors may pick up parking permits free of charge at Parking Services, Bldg. 20W; the University Police Department, Bldg. 94; or the Visitor's Center, Bldg. 81. Visitors are allowed to use designated visitor or commuter parking spaces or areas. Failure to obtain a permit may result in a citation being issued to a visitor's vehicle. Visitors may clear their first citation for "lack of permit" or "parking in a restricted area" by bringing the ticket to Parking Services. Visitors with valid state issued special needs permits can park in visitor parking spaces without a visitor's pass. Current employees and students who are also members of the Alumni Association are not eligible for visitor passes and are not entitled to park in visitor parking areas through their membership in the Alumni Association.~~

~~3. Disability~~

~~Parking permits for people with disabilities are available through the State of Florida's local tag office in accordance with Florida state statute, Section 316.1964. The University requires that the State issued disability parking permits or license plates are displayed on the vehicles parked in special needs spaces. Holders of such parking permits or license plates are not required to purchase a University of West Florida parking permit and may park in non-reserved spaces if designated disabled spaces are not available. Further information regarding special parking accommodations can be found online at www.uwf.edu/parking.~~

~~4. Temporary and Special~~

~~Temporary and special permits are issued at Parking Services, Bldg. 20W the University Police Department, Bldg. 94; or the Visitor's Center, Bldg. 81 for special circumstances such as daily visitors, vendors, business consultants, borrowed vehicles, temporary and volunteer workers, and special user needs.~~

~~a. Different Vehicle~~

~~Permit holders temporarily driving an unregistered vehicle must obtain a temporary parking permit *prior* to parking on campus. One temporary permit is valid for up to two weeks will be issued free of charge.~~

~~b. Off-Campus Students~~

~~Students who enroll at the Fort Walton Beach campus must obtain parking permits if their vehicles are parked on the University of West Florida's main campus. One-day permits can be obtained from the Visitor's Center or Parking Services at no cost. If any course work is to be completed on the University's main campus, the student must purchase a permit and the appropriate permit fee schedule will apply.~~

~~c. Off-Campus Employees~~

~~University employees who are permanently assigned to work at off-campus locations may obtain a parking permit by contacting the Parking and Transportation Services Office.~~

~~d. Retired Employees~~

~~Retired University of West Florida employees, who are no longer employed at the University, or the spouses of deceased retired employees are eligible to receive one free non-expiring parking hangtag upon request to the Director of Parking and Transportation Services. Retired Employee Hangtags can be used on up to three vehicles.~~

~~e. Alumni~~

~~Current Sustaining Members of The Alumni Association may pick up Alumni Parking Hangtags in the Parking and Transportation Office in bldg. 20W. Alumni Parking Hangtags can be registered for up to three vehicles. Alumni Hangtags become invalid if the recipient registers for coursework or becomes employed by the University or any of its contracted agencies whose employees are required to purchase parking permits.~~

~~F. Parking Restrictions~~

~~It is the responsibility of all University of West Florida employees and students to know the University's parking regulations. Employees and students must follow all parking restrictions.~~

~~1. Parking Requirements for All Vehicles~~

- ~~a. Parking on grass, sidewalks, crosswalks, streets, curbs or unimproved areas is prohibited.~~
- ~~b. Vehicles that create a hazard or constitute a nuisance will be towed away immediately at the owner's expense.~~
- ~~c. Overnight parking of any vehicle other than a vehicle with a resident student permit displayed or a guest of a resident student with a temporary permit displayed is prohibited.~~
- ~~d. Residing or sleeping overnight in vehicles parked on campus is prohibited.~~
- ~~e. Lack of parking spaces will not be considered a valid excuse for violation of parking regulations.~~
- ~~f. Parking overtime in time limited spaces is prohibited.~~

~~2. Regulated Parking~~

~~Regulated Parking lots/spaces that are designated by posted signage or painted marking are restricted 24 hours a day, 7 days a week unless otherwise specified. Regulated spaces are spaces designated for certain vehicles and include the following:~~

~~a. Numbered Reserved Parking~~

~~Numbered reserved spaces are reserved for designated permit holders between the hours of 7:00 a.m. and 5:30 p.m. Monday through Friday.~~

~~b. Administrative Parking~~

~~Administrative lots/spaces are reserved for those with Administrative Permits. Those with an Administrative permit may park anywhere except in numbered reserved spaces.~~

~~c. Loading Zone~~

~~The period of use for loading or unloading purposes will be restricted to 30 minutes. Prior permission from Parking Services to park in a Loading Zone is required. Parking regulations in Loading Zones will be enforced at all times.~~

~~d. Visitor Parking~~

~~Visitors with a temporary visitor permit are allowed to use commuter parking spaces, or designated visitor parking spaces only. Visitor permits can be obtained at the Visitor's Center, Bldg. 81; Parking Services, Bldg. 20W; or the University Police Department, Bldg. 94.~~

~~e. Other Parking~~

~~Other spaces on campus are restricted for designated functions such as Special permit, State Vehicles, Police and Service Vehicles and are marked accordingly.~~

~~3. Resident Student Parking~~

~~Resident student parking lots/spaces are marked by posted signage with colors that correspond to the permit color. Those lots are restricted 24 hours a day, 7 days a week. Notification of when the restrictions on Resident Student lots/spaces are lifted will be posted on the University website. For more information regarding resident parking on campus click the resident tab at www.uwf.edu/parking.~~

~~4. Commuter Student Parking~~

~~Commuter students must park in spaces designated as commuter student parking by posted signage between the hours of 7:00 a.m. and 4:30 p.m. Between the hours of 4:30 p.m. and 7:00 a.m., commuter students may park in any space on campus except restricted spaces, which include visitor, fire lanes, police, reserved, resident, disabled, service and state spaces. After 5:30 p.m. all vehicles, including those of Commuter students, with valid parking permits may park in any numbered reserved space. However, overnight parking is not permitted by anyone other than those with valid and current Resident permits and their guests with appropriate temporary permits.~~

~~5. Faculty and Staff Parking~~

~~Faculty and staff lots/spaces are restricted to faculty and staff permit holders from 7:00 a.m. to 4:30 p.m. After those hours, any vehicle with a valid permit may park in faculty and staff lots/spaces except those spaces where posted signage or painted marking indicate that the space is restricted or reserved. Number reserved spaces become available for use to faculty and staff between the hours of 5:30 p.m. to 7:00 a.m. Faculty and staff may park in commuter lots for overflow parking.~~

~~6. Motorcycle Parking~~

~~Motorcycles must park in designated motorcycle spaces only. This is a 24-hour restriction.~~

~~G. Immobilization and Towing~~

~~1. Immobilization~~

~~Persons with three or more unpaid parking citations are subject to vehicle immobilization and an administrative fee. Vehicles parked in a number reserved space without the appropriate permit are subject to immediate immobilization and/or towing.~~

~~2. Immobilization Fees~~

~~First Immobilization: \$50.00 Second Immobilization: \$100.00 Third Immobilization: \$150.00 and loss of parking privileges.~~

~~3. Towing of Immobilized Vehicles~~

~~Arrangements must be made within 24 hours of immobilization to pay accrued fines and administrative fees or the vehicle is subject to towing.~~

~~4. Responsibility for Costs~~

~~The fees and costs of immobilization and/or towing will be charged to the following persons:~~

- ~~a. The permit holder for the vehicle is responsible for the towing fee administrative fee regardless of whether the permit holder is the owner of the vehicle or not. If the owner is not a permit holder and the vehicle is not registered with the University, then~~
- ~~b. The owner registered with the state will be responsible for towing and administrative fees.~~

~~H. The Parking Violations Appeal Board~~

~~The Parking Violations Appeals Board (PVAB) is established under the authority of the President of the University of West Florida to adjudicate appeals of parking citations issued on campus. The PVAB may sustain or dismiss charges, levy appropriate fines, restrict and restore driving privileges on campus, and impose and remove administrative sanctions. The PVAB does not have the jurisdiction to review or hear appeals regarding the Uniform Traffic Citations issued under the authority of Chapters 316 or 318, Florida Statutes, which govern the violations of traffic laws.~~

~~1. Membership~~

~~The PVAB is comprised of six members nominated as follows:~~

- ~~a. One faculty member from the Faculty Senate;~~
- ~~b. One staff member from the Staff Senate;~~
- ~~c. Two students: one resident and one commuter, chosen by the Student Government Association;~~
- ~~d. A representative from Human Resources; and~~
- ~~e. The Parking Services Manager, who shall serve as a non-voting, ex-official member.~~

~~2. Operating Procedures~~

- ~~a. The chairperson will be elected annually by the members and have full voting rights.~~
- ~~b. The PVAB will meet as required to discharge their responsibilities.~~
- ~~c. A quorum will consist of at least three members. A simple majority of Board members voting will be required to render decisions and take action.~~

~~I. Parking Services Appeals Procedure~~

~~Parking citations may be appealed through two levels.~~

~~1. Level One~~

~~All appeals must be filed online via the parking portal. Verbal appeals will not be accepted. Appeals must be filed within 7 days of the issuance of the citation. To file an appeal log into my.uwf.edu and search "parking." Appeals must be filed within seven calendar days of issuance of the citation. After seven calendar days the right to appeal is forfeited. At this level appeals go to the Parking Services Manager's office. The Parking Services Manager, or his designee, makes all decisions regarding level one appeals. Level One decisions will be emailed to the individual appealing the citation. Appeals taking the following forms will not be considered valid and will be denied at the first level:~~

- ~~a. Being late for an appointment or class~~

- ~~b. Unaware permit was expired~~
- ~~c. Disagreement with the Parking Rules and Regulations~~
- ~~d. Someone else used the vehicle and parked the vehicle~~
- ~~e. Unable to find a parking space~~
- ~~f. Inability to pay the fine~~
- ~~g. Unaware of the Parking Rules and Regulations~~
- ~~h. Parked illegally in the same area previously without being cited~~
- ~~i. Perception that designated area is unsafe~~

~~2. Level Two~~

~~The second level of appeal is through the Parking Violations Appeal Board (PVAB). Appeals denied at the first level will be advanced to the second level only by official request. Requests for advancement to the second level must be made within 7 days of the first level decision. Requests for advancement to the second level must be made via email. Instructions for appealing to Level Two will be provided in the Level One response email. The date, time and location of PVAB meetings at which the appeals are heard will be displayed on the Parking Portal. Individuals appealing a citation will be afforded an opportunity to appear before the PVAB to present their appeals in person. If the individual fails to appear, the appeal will continue in the individual's absence. Level Two decisions will be emailed to the individual appealing the citation. The PVAB's decision is final and binding.~~

~~J. Payment of Fines~~

~~Violators of parking regulations are subject to citations resulting in the assessment of fines. Individuals receiving a University of West Florida parking citation can pay the citation online by logging into myuwf and putting "parking in the search box." A hold will be placed on the student account until the fine is paid or until the ticket is voided on appeal.~~

~~K. Schedule of Fines~~

~~1. Vehicle Registration Fines~~

Violation	Fines
Improper display of permit	\$15.00
Attaching a permit to a vehicle not listed on the registration form	\$15.00
Taping or temporarily affixing permit to vehicle unless otherwise directed by Parking Services	\$15.00
Display of expired permit	\$20.00
Altering or defacing a permit	\$25.00
Failure to register vehicle	\$50.00
Registration obtained through falsehood, misrepresentation, or incomplete information on the vehicle registration form	\$100.00

~~2. Parking Violation Fines~~

Violation	Fines
Overtime parking	\$10.00
Parking over the line	\$15.00
Parking on curb, grass, or sidewalks	\$25.00
Parking overnight	\$25.00
Parking out of permit designation	\$25.00
Parking that obstructs traffic	\$25.00
Parking in a service area	\$25.00
Parking in a no parking zone	\$25.00
Parking in resident space	\$50.00
Parking in reserved space	\$100.00
Parking while suspended	\$50.00
Parking in handicap spaces illegally	\$100.00
Parking in fire lane	\$100.00
Blocking handicap ramp	\$100.00

~~L. Alternatives to Parking on Campus~~

~~Trolleys provide a valuable and convenient alternative to finding parking, particularly when faculty, staff and nonresident student lots are congested. Convenient pickup and drop-off service is available at numerous sites around campus. The University of West Florida provides trolley routes to meet most transportation needs of students, faculty and staff. The transportation access fee for students is \$8.00 per credit hour. The transportation access fee charged to employees is \$6.50 per year. This fee is charged at the time of purchase of each employee parking permit.~~

I. General Statement:

A. General Information

The University of West Florida (the “University”) strives to provide a safe environment for employees, students, and visitors. Parking a vehicle on any of the University’s campuses is a privilege that may be granted or and revoked by the University. The University is authorized and reserves the right to regulate its vehicle parking facilities for the exclusive use of designated groups or individuals. All vehicles parked on campus are parked at the risk of the owner. The University does not assume liability for vehicles or items left in vehicles. By parking on campus, employees, students and others agree to abide by and follow all provisions contained herein. Fort Walton Beach campus permits are invalid on the Pensacola campus. For the purposes of this Regulation, “business hours” means 7:00 a.m. to 4:30 p.m., Monday through Friday, excluding days when the University is closed for business (such as holidays).

B. Registration

1. All automobiles and motorcycles on campus during business hours must be registered with the Parking and Transportation Services department (“Parking Services”) the first day the vehicle is on campus.
2. Temporary parking permits are available for visitors, guests, vendors, business consultants, registered individuals driving borrowed vehicles, temporary or volunteer workers, and similarly-situated individuals.
3. Services for parking registration are available at the following locations:
 - a. Online by accessing the Parking Transaction Portal through my.uwf.edu;
 - b. Parking Services;
 - c. University Police Department, Building 94;
 - d. Visitor’s Center, Building 81 (visitors, guests, vendors, business consultants, borrowed vehicles, temporary and volunteer workers); and
 - e. Visitors and Guests may also register their vehicle and obtain a virtual permit through the Parking Portal. Visitors and Guests will need to create a Guest Account in order to obtain their virtual permit. The portal may be accessed through MyUWF or through the Parking Website: www.uwf.edu/parking.

C. Permits

1. The fees for annual permits are:

Reserved/Admin	\$363
Faculty/Staff	\$145
Resident	\$145
Commuter	\$114
Motorcycle	\$ 73
Back-In Hang Tag	\$ 25

Permits are issued for an academic year or semester. Semester permits are one-half the annual permit price. Permit prices include applicable Florida sales tax.

2. All vehicles parked on campus during business hours must be registered with Parking Services and must have a virtual permit. A virtual permit is not a physical permit. Instead, the vehicle license plate is used to determine whether or not the vehicle is properly registered. Up to three vehicles may be registered under a single virtual

- permit. However, only one of the registered vehicles may be parked on campus at any one time.
3. Permit holders must park in designated parking areas for the type of permit they hold. Instructions and detailed maps can be found on the Parking webpage: www.uwf.edu/parking. Maps are also available in the Parking Services office.
 4. Purchasing a permit does not guarantee a parking space. Purchasing a permit does not entitle the holder to a parking space at events outside of business hours.
 5. Each permit contains an expiration date and is no longer valid after that date. Expiration dates are disclosed at the time of purchase, on the receipt for the virtual permit, and under the user profile on the Parking Portal.
 6. Only one permit is allowed per vehicle. Expired permits must be removed from display.
 7. Virtual permits may not be transferred to another individual; however, virtual permits may be transferred to a different car owned by the same permit holder. Permit holders are responsible for violations committed by any person using their registered permit.
 8. Individuals with outstanding parking citations or fines are not eligible for issuance or renewal of a virtual permit.
 9. Upon sale or disposal of a registered vehicle, the permit must be transferred to a new vehicle owned by the same registered individual or terminated.

D. Permit Designations and Restrictions

1. Resident Students

During business hours, resident students may park only in areas marked as Resident or Open to All Permits. Resident students moving from one residence hall to another must contact Parking Services to update their registration. Resident lots are always restricted to vehicles with Resident permits, even outside of business hours.

2. Commuter Students

During business hours, commuter students may park only in areas marked as Commuter or Open to All Permits. Commuters may not park in spaces marked for residents. Commuter spaces are not restricted to Commuter permits outside of business hours.

3. Faculty and Staff

During business hours, faculty and staff may park in areas marked as Faculty and Staff or Open to All Permits. Faculty and Staff spaces are not restricted to Faculty and Staff permits outside of business hours.

4. Visitor

Visitor permits are temporary and required during business hours. Vehicles with a Visitor permit may park only in areas marked Commuter, Visitor, or Open to All Permits.

Visitors may obtain a parking permit free of charge. Failure to obtain a permit may result in a citation being issued. Current employees and students are ineligible for a Visitor permit and are not entitled to park in visitor parking areas, including spaces designated for the UWF Alumni Association, and must obtain an appropriate permit.

5. Disabled Persons

Disabled person parking permits are available through the State of Florida in accordance with Section 316.1964, Florida Statutes. Such permits must be displayed on vehicles when parked on campus. Holders of such parking permits are not required to purchase a parking permit and may park in non-reserved spaces if designated spaces for disabled person parking are not available.

6. Temporary

Temporary permits may be issued in special circumstances including, but not limited to, the following:

a. Different Vehicle

Permit holders temporarily driving a different vehicle must obtain a temporary virtual permit *prior* to parking on campus. One temporary virtual permit, valid for up to two weeks per individual per semester, will be issued at no cost.

b. Satellite Campus Students

Students who enroll at the Fort Walton Beach campus or any other satellite campus must obtain a parking permit for the main campus when parking on the main campus. A one-day permit is available at no cost. An appropriate virtual permit must be purchased at any time courses are attended on the main campus.

c. Off-Campus Employees

University employees who are permanently assigned to work at off-campus locations may obtain a temporary virtual permit at no charge by contacting Parking Services.

d. Retired Employees

Retired University employees and the spouses of deceased retired employees may be issued one free non-expiring virtual permit upon request to the Director of Parking and Transportation Services. Such permits may be registered for up to three vehicles. Retired employee permits become invalid if the recipient registers for coursework or becomes employed by the University or any of its contracted agencies whose employees are required to purchase parking permits.

e. Alumni

Current Sustaining Members of the Alumni Association may obtain an Alumni permit from Parking Services. Alumni permits may be registered for up to three vehicles. Alumni permits become invalid if the recipient registers for coursework or becomes employed by the University or any of its contracted agencies whose employees are required to purchase parking permits.

E. Parking Restrictions

It is the responsibility of all University employees and students and visitors to know the University's parking regulations. Employees and students must follow all parking restrictions.

1. Parking Requirements for all vehicles

- a. Parking on grass, sidewalks, crosswalks, streets, curbs or unimproved areas is prohibited.
- b. The University may tow any vehicle that is parked in such a way that it restricts the normal operation of business, blocks or impedes traffic, hinders the operations of an emergency vehicle, or is parked in a designated tow-away zone.
- c. Overnight parking of any vehicle other than a vehicle with a resident student permit or a guest of a resident student with a temporary permit is prohibited.
- d. Residing or sleeping overnight in vehicles parked on campus is prohibited.
- e. Unavailability of parking spaces is not considered a valid excuse for violation of parking regulations.

- f. Parking overtime in time-limited spaces is prohibited.
 - g. License plates must be visible to the travel lane through a parking lot or, if parking on a road, to the travel lane of the roadway. It is prohibited to fail to display a license plate to the travel lane; to back into or pull through a parking space so that the license plate is not visible from the travel lane; and to remove a plate or obscuring a plate so that it cannot be read from the travel lane.
2. Backing In Parking:
- a. Nose-in parking remains required in all parking garages to allow LPR (License Plate Recognition) enforcement and minimize hazards. Vehicles backed into garage spaces will be cited.
 - b. Back-in parking is permitted in surface lot spaces only and is prohibited in garages, angled spaces, and other restricted areas.
 - c. Students, faculty, staff, and visitors may purchase a Back-In Hang Tag for \$25/year.
 - d. The Back-In Hang Tag is supplemental and must be purchased with a valid campus parking permit.
 - e. If another hang tag is in use, the Back-In Hang Tag may be displayed on the dashboard, provided both permits are visible.
 - f. ADA accommodations: Vehicles with valid state-issued disabled plates or placards may back into marked disabled spaces without a Back-In Hang Tag, provided a campus parking permit is also displayed.
 - g. Exceptions: Vehicles may back in without a Back-In Hang Tag if:
 - i. Required for ADA access;
 - ii. Needed to charge at a designated EV station;
 - iii. Displaying a valid state-issued front license plate;
 - iv. Displaying an optional UWF-issued front tag matching the rear license plate

3. Regulated Parking

Regulated parking lots and spaces that are designated by posted signage or painted marking are restricted 24 hours a day, 7 days a week, unless otherwise specified. Regulated spaces are designated for certain vehicles including the following:

a. Numbered Reserved Parking

Numbered reserved spaces are reserved for designated permit holders between the hours of 7:00 a.m. and 5:30 p.m., Monday through Friday, excluding University

closures. Outside of those hours, anyone may park in a numbered reserved space.

b. Administrative Parking

Administrative lots and spaces are reserved for those with administrative permits. Individuals with an administrative permit may park anywhere except in numbered reserved spaces.

c. Loading Zone

Advance permission from Parking Services is required to park in a loading zone. Loading zones may be utilized for a maximum of 30 minutes.

d. Visitor Parking

Visitor parking spaces are reserved at all times for individuals with appropriate visitor permits.

e. Other Parking

Other spaces on campus may be restricted for designated functions such as special permits, state vehicles, police, and service vehicles. Those spaces are marked accordingly.

4. Motorcycle Parking

Motorcycles must park in designated motorcycle spaces only at all times.

5. Special Event Parking

During special events, parking in selected areas may be limited and subject to an additional special parking fee for the event.

F. Pregnant Employee Parking

1. Employees who have a limitation related to, affected by, or arising out of pregnancy, childbirth, or related medical conditions may be eligible for a Pregnant Employee Parking Permit.
2. Employees are responsible for communicating such a limitation to the University by contacting their supervisor or Human Resources and requesting the accommodation. After making the request, the University will engage with the employee in an interactive process, which may include a request for supporting documentation from the employee only when it is reasonable to do so under the circumstances.

G. Immobilization and Towing

1. Immobilization

Three or more unpaid parking citations may result in vehicle immobilization and a corresponding administrative fee. Vehicles parked in a reserved space without the appropriate credentials are subject to immediate immobilization. Arrangements must be made within 24 hours of immobilization to pay accrued parking fines and fees or the vehicle is subject to towing.

2. Immobilization Fees

First Immobilization: \$50.00

Second Immobilization: \$100.00

Third Immobilization: \$150.00 and loss of parking privileges.

3. Responsibility for Costs

The permit holder for the vehicle is responsible for assessed towing and administrative fees regardless of whether the permit holder is the owner of the vehicle. If the vehicle is not registered with the University, then the owner registered with the applicable state will be responsible for towing and administrative fees.

H. The Parking Violations Appeal Board

The Parking Violations Appeals Board (PVAB) adjudicates appeals of parking citations issued on campus. The PVAB may sustain or dismiss charges, levy appropriate fines, restrict or restore campus driving privileges, and impose or remove administrative sanctions. The PVAB does not have the jurisdiction to review or hear appeals regarding Uniform Traffic Citations issued by the University Police Department or local law enforcement.

1. Membership

The PVAB is composed of six members as follows:

- a. One faculty member appointed by the Faculty Senate;
- b. One staff member appointed by the Staff Senate;
- c. One resident student designated by the Student Government Association;
- d. One commuter student designated by the Student Government Association;
- e. A representative appointed by Human Resources; and
- f. The Parking Services Manager, who shall serve as a non-voting, ex-officio member.

2. Operating Procedures

- a. The chairperson will be elected annually by the members of the PVAB and have full voting rights.
- b. The PVAB will meet as required to discharge their responsibilities. Meetings may be held remotely.
- c. A quorum will consist of at least three voting members. A simple majority of members voting will be required to render decisions and take action. If the vote results in a tie, the decision under appeal will stand.

I. Parking Services Appeals

Parking citations issued by the University may be appealed through two levels.

1. Level One

All appeals must be filed online via the parking portal within seven days of the issuance of the citation. Verbal appeals will not be accepted. The parking portal can be accessed by logging in to my.uwf.edu and searching for “parking.” Appeals will be reviewed by the Director of Parking Services or their designee. The individual who filed the appeal will be notified by email of the result.

Appeals on the following grounds will automatically be denied:

- a. Being late for an appointment or class;
- b. Unaware permit was expired;
- c. Disagreement with the parking rules and regulations;
- d. Someone else used the vehicle and parked the vehicle;
- e. Unable to find a parking space;
- f. Inability to pay the fine;
- g. Unaware of the Parking Rules and Regulations;
- h. Parked previously in the same area without being cited;
- i. Perception that the designated area is unsafe;
- j. Failure to see posted signage; or
- k. Direction by someone else to park in the space.

2. Level Two

If the appellant is not satisfied with the outcome of the appeal to the Parking Service Manager, they may further appeal to the Parking Violations Appeal Board (PVAB) by written request within 7 days of the first level decision. Instructions for appealing to the PVAB will be provided in the Level One response email.

The date, time, and location of PVAB meetings at which the appeals are heard will be displayed on the parking portal. Individuals appealing a citation will be afforded an opportunity to present their appeals before the PVAB. If the meeting is held in person, the appellant may present in person or virtually. If the appellant fails to appear, the appeal will continue in the appellant’s absence. The decision of the PVAB will be emailed to the appellant and will be final.

J. Payment of Fines

Violators of parking regulations are subject to citations resulting in the assessment of fines. Fines may be paid online by logging in to my.uwf.edu and searching for “parking.” A diploma hold will be placed on the student account until the fine is paid or until the ticket is voided on appeal.

K. Schedule of Fines

1. Vehicle Registration Fines

<u>Violation</u>	<u>Fines</u>
<u>Display of expired permit</u>	<u>\$20.00</u>
<u>Failure to register vehicle with Parking Services</u>	<u>\$50.00</u>
<u>Registration obtained through falsehood, misrepresentation, or incomplete information</u>	<u>\$100.00</u>

2. Parking Violation Fines

<u>Violation</u>	<u>Fines</u>
<u>Overtime parking</u>	<u>\$10.00</u>
<u>Parking over the line</u>	<u>\$15.00</u>
<u>Parking on curb, grass, or sidewalks</u>	<u>\$25.00</u>
<u>Parking overnight</u>	<u>\$25.00</u>
<u>Parking out of permit designation</u>	<u>\$25.00</u>
<u>Parking that obstructs traffic</u>	<u>\$25.00</u>
<u>Parking in a service area</u>	<u>\$25.00</u>
<u>Parking in a no parking zone</u>	<u>\$25.00</u>
<u>Parking in a resident space</u>	<u>\$50.00</u>
<u>Parking in a reserved space</u>	<u>\$100.00</u>
<u>Parking while suspended</u>	<u>\$50.00</u>
<u>Parking in a disabled space without a disabled person parking permit</u>	<u>\$100.00</u>
<u>Parking in a fire lane</u>	<u>\$100.00</u>
<u>Blocking a ramp</u>	<u>\$100.00</u>
<u>Parking in a pregnant employee space</u>	<u>\$100.00</u>
<u>Failing to display a license plate to the travel lane</u>	<u>\$25.00</u>
<u>Back-In without Permit</u>	<u>\$25.00</u>

Effective Date: [date]

Authority: Sections 1006.66, 1009.24, and 1009.26, Florida Statutes
The Pregnant Workers Fairness Act and implementing regulations: 42 U.S.C.
2000gg; 29 U.S.C. Part 1636.

History: Adopted as Rule 6C6-5.01 October 1978; amended October 1979, October 1980, August 1981, February 1986, May 1990, May 1995, May 2005, August 2005; converted to regulation July 2005; amended December 2005, May 2006, June 2011, June 2012, June 2014, December 2021, and [date]

Last review: [date]

Effective Date: [date]

Authority: Sections 1006.66, 1009.24, and 1009.26, Florida Statutes

History: ~~Adopted as Rule 6C6-5.01 October 1978; amended October 1979, October 1980, August 1981, February 1986, May 1990, May 1995, May 2005, August 2005; converted to regulation July 2005; amended December 2005, May 2006, June 2011, June 2012, June 2014, December 2021, and [date]~~

Last review: [date]



Number: UWF/REG 5.001
Title: Parking and Registration
Responsible
Department: Parking and Transportation Services

I. General Statement:

A. General Information

The University of West Florida (the “University”) strives to provide a safe environment for employees, students, and visitors. Parking a vehicle on any of the University’s campuses is a privilege that may be granted or and revoked by the University. The University is authorized and reserves the right to regulate its vehicle parking facilities for the exclusive use of designated groups or individuals. All vehicles parked on campus are parked at the risk of the owner. The University does not assume liability for vehicles or items left in vehicles. By parking on campus, employees, students and others agree to abide by and follow all provisions contained herein. Fort Walton Beach campus permits are invalid on the Pensacola campus. For the purposes of this Regulation, “business hours” means 7:00 a.m. to 4:30 p.m., Monday through Friday, excluding days when the University is closed for business (such as holidays).

B. Registration

1. All automobiles and motorcycles on campus during business hours must be registered with the Parking and Transportation Services department (“Parking Services”) the first day the vehicle is on campus.
2. Temporary parking permits are available for visitors, guests, vendors, business consultants, registered individuals driving borrowed vehicles, temporary or volunteer workers, and similarly-situated individuals.
3. Services for parking registration are available at the following locations:
 - a. Online by accessing the Parking Transaction Portal through my.uwf.edu;
 - b. Parking Services;
 - c. University Police Department, Building 94;

- d. Visitor's Center, Building 81 (visitors, guests, vendors, business consultants, borrowed vehicles, temporary and volunteer workers); and
- e. Visitors and Guests may also register their vehicle and obtain a virtual permit through the Parking Portal. Visitors and Guests will need to create a Guest Account in order to obtain their virtual permit. The portal may be accessed through MyUWF or through the Parking Website: www.uwf.edu/parking.

C. Permits

1. The fees for annual permits are:

Reserved/Admin	\$363
Faculty/Staff	\$145
Resident	\$145
Commuter	\$114
Motorcycle	\$ 73
Back-In Hang Tag	\$ 25

Permits are issued for an academic year or semester. Semester permits are one-half the annual permit price. Permit prices include applicable Florida sales tax.

2. All vehicles parked on campus during business hours must be registered with Parking Services and must have a virtual permit. A virtual permit is not a physical permit. Instead, the vehicle license plate is used to determine whether or not the vehicle is properly registered. Up to three vehicles may be registered under a single virtual permit. However, only one of the registered vehicles may be parked on campus at any one time.
3. Permit holders must park in designated parking areas for the type of permit they hold. Instructions and detailed maps can be found on the Parking webpage: www.uwf.edu/parking. Maps are also available in the Parking Services office.
4. Purchasing a permit does not guarantee a parking space. Purchasing a permit does not entitle the holder to a parking space at events outside of business hours.
5. Each permit contains an expiration date and is no longer valid after that date. Expiration dates are disclosed at the time of purchase, on the receipt for the virtual permit, and under the user profile on the Parking Portal.
6. Only one permit is allowed per vehicle. Expired permits must be removed from display.
7. Virtual permits may not be transferred to another individual; however, virtual permits may be transferred to a different car owned by the same permit holder. Permit holders are responsible for violations committed by any person using their registered permit.

8. Individuals with outstanding parking citations or fines are not eligible for issuance or renewal of a virtual permit.
9. Upon sale or disposal of a registered vehicle, the permit must be transferred to a new vehicle owned by the same registered individual or terminated.

D. Permit Designations and Restrictions

1. Resident Students

During business hours, resident students may park only in areas marked as Resident or Open to All Permits. Resident students moving from one residence hall to another must contact Parking Services to update their registration. Resident lots are always restricted to vehicles with Resident permits, even outside of business hours.

2. Commuter Students

During business hours, commuter students may park only in areas marked as Commuter or Open to All Permits. Commuters may not park in spaces marked for residents. Commuter spaces are not restricted to Commuter permits outside of business hours.

3. Faculty and Staff

During business hours, faculty and staff may park in areas marked as Faculty and Staff or Open to All Permits. Faculty and Staff spaces are not restricted to Faculty and Staff permits outside of business hours.

4. Visitor

Visitor permits are temporary and required during business hours. Vehicles with a Visitor permit may park only in areas marked Commuter, Visitor, or Open to All Permits.

Visitors may obtain a parking permit free of charge. Failure to obtain a permit may result in a citation being issued. Current employees and students are ineligible for a Visitor permit and are not entitled to park in visitor parking areas, including spaces designated for the UWF Alumni Association, and must obtain an appropriate permit.

5. Disabled Persons

Disabled person parking permits are available through the State of Florida in accordance with Section 316.1964, Florida Statutes. Such permits must be displayed on vehicles when parked on campus. Holders of such parking permits are not required to purchase a parking permit and may park in non-reserved spaces if designated spaces for disabled person parking are not available.

6. Temporary

Temporary permits may be issued in special circumstances including, but not limited to, the following:

a. Different Vehicle

Permit holders temporarily driving a different vehicle must obtain a temporary virtual permit *prior* to parking on campus. One temporary virtual permit, valid for up to two weeks per individual per semester, will be issued at no cost.

b. Satellite Campus Students

Students who enroll at the Fort Walton Beach campus or any other satellite campus must obtain a parking permit for the main campus when parking on the main campus. A one-day permit is available at no cost. An appropriate virtual permit must be purchased at any time courses are attended on the main campus.

c. Off-Campus Employees

University employees who are permanently assigned to work at off-campus locations may obtain a temporary virtual permit at no charge by contacting Parking Services.

d. Retired Employees

Retired University employees and the spouses of deceased retired employees may be issued one free non-expiring virtual permit upon request to the Director of Parking and Transportation Services. Such permits may be registered for up to three vehicles. Retired employee permits become invalid if the recipient registers for coursework or becomes employed by the University or any of its contracted agencies whose employees are required to purchase parking permits.

e. Alumni

Current Sustaining Members of the Alumni Association may obtain an Alumni permit from Parking Services. Alumni permits may be registered for up to three vehicles. Alumni permits become invalid if the recipient registers for coursework

or becomes employed by the University or any of its contracted agencies whose employees are required to purchase parking permits.

E. Parking Restrictions

It is the responsibility of all University employees and students and visitors to know the University's parking regulations. Employees and students must follow all parking restrictions.

1. Parking Requirements for all vehicles

- a. Parking on grass, sidewalks, crosswalks, streets, curbs or unimproved areas is prohibited.
- b. The University may tow any vehicle that is parked in such a way that it restricts the normal operation of business, blocks or impedes traffic, hinders the operations of an emergency vehicle, or is parked in a designated tow-away zone.
- c. Overnight parking of any vehicle other than a vehicle with a resident student permit or a guest of a resident student with a temporary permit is prohibited.
- d. Residing or sleeping overnight in vehicles parked on campus is prohibited.
- e. Unavailability of parking spaces is not considered a valid excuse for violation of parking regulations.
- f. Parking overtime in time-limited spaces is prohibited.
- g. License plates must be visible to the travel lane through a parking lot or, if parking on a road, to the travel lane of the roadway. It is prohibited to fail to display a license plate to the travel lane; to back into or pull through a parking space so that the license plate is not visible from the travel lane; and to remove a plate or obscuring a plate so that it cannot be read from the travel lane.

2. Backing In Parking:

- a. Nose-in parking remains required in all parking garages to allow LPR (License Plate Recognition) enforcement and minimize hazards. Vehicles backed into garage spaces will be cited.
- b. Back-in parking is permitted in surface lot spaces only and is prohibited in garages, angled spaces, and other restricted areas.
- c. Students, faculty, staff, and visitors may purchase a Back-In Hang Tag for \$25/year.

- d. The Back-In Hang Tag is supplemental and must be purchased with a valid campus parking permit.
- e. If another hang tag is in use, the Back-In Hang Tag may be displayed on the dashboard, provided both permits are visible.
- f. ADA accommodations: Vehicles with valid state-issued disabled plates or placards may back into marked disabled spaces without a Back-In Hang Tag, provided a campus parking permit is also displayed.
- g. Exceptions: Vehicles may back in without a Back-In Hang Tag if:
 - i. Required for ADA access;
 - ii. Needed to charge at a designated EV station;
 - iii. Displaying a valid state-issued front license plate;
 - iv. Displaying an optional UWF-issued front tag matching the rear license plate

3. Regulated Parking

Regulated parking lots and spaces that are designated by posted signage or painted marking are restricted 24 hours a day, 7 days a week, unless otherwise specified. Regulated spaces are designated for certain vehicles including the following:

a. Numbered Reserved Parking

Numbered reserved spaces are reserved for designated permit holders between the hours of 7:00 a.m. and 5:30 p.m., Monday through Friday, excluding University closures. Outside of those hours, anyone may park in a numbered reserved space.

b. Administrative Parking

Administrative lots and spaces are reserved for those with administrative permits. Individuals with an administrative permit may park anywhere except in numbered reserved spaces.

c. Loading Zone

Advance permission from Parking Services is required to park in a loading zone. Loading zones may be utilized for a maximum of 30 minutes.

d. Visitor Parking

Visitor parking spaces are reserved at all times for individuals with appropriate visitor permits.

e. Other Parking

Other spaces on campus may be restricted for designated functions such as special permits, state vehicles, police, and service vehicles. Those spaces are marked accordingly.

4. Motorcycle Parking

Motorcycles must park in designated motorcycle spaces only at all times.

5. Special Event Parking

During special events, parking in selected areas may be limited and subject to an additional special parking fee for the event.

F. Pregnant Employee Parking

1. Employees who have a limitation related to, affected by, or arising out of pregnancy, childbirth, or related medical conditions may be eligible for a Pregnant Employee Parking Permit.
2. Employees are responsible for communicating such a limitation to the University by contacting their supervisor or Human Resources and requesting the accommodation. After making the request, the University will engage with the employee in an interactive process, which may include a request for supporting documentation from the employee only when it is reasonable to do so under the circumstances.

G. Immobilization and Towing

1. Immobilization

Three or more unpaid parking citations may result in vehicle immobilization and a corresponding administrative fee. Vehicles parked in a reserved space without the appropriate credentials are subject to immediate immobilization. Arrangements must be made within 24 hours of immobilization to pay accrued parking fines and fees or the vehicle is subject to towing.

2. Immobilization Fees

First Immobilization: \$50.00

Second Immobilization: \$100.00

Third Immobilization: \$150.00 and loss of parking privileges.

3. Responsibility for Costs

The permit holder for the vehicle is responsible for assessed towing and administrative fees regardless of whether the permit holder is the owner of the vehicle. If the vehicle

is not registered with the University, then the owner registered with the applicable state will be responsible for towing and administrative fees.

H. The Parking Violations Appeal Board

The Parking Violations Appeals Board (PVAB) adjudicates appeals of parking citations issued on campus. The PVAB may sustain or dismiss charges, levy appropriate fines, restrict or restore campus driving privileges, and impose or remove administrative sanctions. The PVAB does not have the jurisdiction to review or hear appeals regarding Uniform Traffic Citations issued by the University Police Department or local law enforcement.

1. Membership

The PVAB is composed of six members as follows:

- a. One faculty member appointed by the Faculty Senate;
- b. One staff member appointed by the Staff Senate;
- c. One resident student designated by the Student Government Association;
- d. One commuter student designated by the Student Government Association;
- e. A representative appointed by Human Resources; and
- f. The Parking Services Manager, who shall serve as a non-voting, ex-officio member.

2. Operating Procedures

- a. The chairperson will be elected annually by the members of the PVAB and have full voting rights.
- b. The PVAB will meet as required to discharge their responsibilities. Meetings may be held remotely.
- c. A quorum will consist of at least three voting members. A simple majority of members voting will be required to render decisions and take action. If the vote results in a tie, the decision under appeal will stand.

I. Parking Services Appeals

Parking citations issued by the University may be appealed through two levels.

1. Level One

All appeals must be filed online via the parking portal within seven days of the issuance of the citation. Verbal appeals will not be accepted. The parking portal can be accessed by logging in to my.uwf.edu and searching for “parking.” Appeals will be reviewed by the Director of Parking Services or their designee. The individual who filed the appeal will be notified by email of the result.

Appeals on the following grounds will automatically be denied:

- a. Being late for an appointment or class;
- b. Unaware permit was expired;
- c. Disagreement with the parking rules and regulations;
- d. Someone else used the vehicle and parked the vehicle;
- e. Unable to find a parking space;
- f. Inability to pay the fine;
- g. Unaware of the Parking Rules and Regulations;
- h. Parked previously in the same area without being cited;
- i. Perception that the designated area is unsafe;
- j. Failure to see posted signage; or
- k. Direction by someone else to park in the space.

2. Level Two

If the appellant is not satisfied with the outcome of the appeal to the Parking Service Manager, they may further appeal to the Parking Violations Appeal Board (PVAB) by written request within 7 days of the first level decision. Instructions for appealing to the PVAB will be provided in the Level One response email.

The date, time, and location of PVAB meetings at which the appeals are heard will be displayed on the parking portal. Individuals appealing a citation will be afforded an opportunity to present their appeals before the PVAB. If the meeting is held in person, the appellant may present in person or virtually. If the appellant fails to appear, the appeal will continue in the appellant's absence. The decision of the PVAB will be emailed to the appellant and will be final.

J. Payment of Fines

Violators of parking regulations are subject to citations resulting in the assessment of fines. Fines may be paid online by logging in to my.uwf.edu and searching for "parking." A diploma hold will be placed on the student account until the fine is paid or until the ticket is voided on appeal.

K. Schedule of Fines

1. Vehicle Registration Fines

Violation	Fines
Display of expired permit	\$20.00
Failure to register vehicle with Parking Services	\$50.00
Registration obtained through falsehood, misrepresentation, or incomplete information	\$100.00

2. Parking Violation Fines

Violation	Fines
Overtime parking	\$10.00
Parking over the line	\$15.00
Parking on curb, grass, or sidewalks	\$25.00
Parking overnight	\$25.00
Parking out of permit designation	\$25.00
Parking that obstructs traffic	\$25.00
Parking in a service area	\$25.00
Parking in a no parking zone	\$25.00
Parking in a resident space	\$50.00
Parking in a reserved space	\$100.00
Parking while suspended	\$50.00
Parking in a disabled space without a disabled person parking permit	\$100.00
Parking in a fire lane	\$100.00
Blocking a ramp	\$100.00
Parking in a pregnant employee space	\$100.00
Failing to display a license plate to the travel lane	\$25.00
Back-In without Permit	\$25.00

Effective Date: [date]

Authority: Sections 1006.66, 1009.24, and 1009.26, Florida Statutes
The Pregnant Workers Fairness Act and implementing regulations: 42 U.S.C.
2000gg; 29 U.S.C. Part 1636.

History: Adopted as Rule 6C6-5.01 October 1978; amended October 1979, October 1980,
August 1981, February 1986, May 1990, May 1995, May 2005, August 2005;
converted to regulation July 2005; amended December 2005, May 2006, June 2011,
June 2012, June 2014, December 2021, and [date]

Last review: July 2025]

7.003 Fees, Fines and Penalties.

(1) The Board of Governors must authorize all fees assessed to students. Accordingly, the specific fees listed in this section, and the tuition and associated fees defined in Regulation 7.001, are the only fees that may be charged for state fundable credit hours without the specific approval of the board, except as authorized in Regulation 8.002. For purposes of clarification, the term "at cost" or "cost" as used in this regulation includes those increased costs that are directly related to the delivery of the goods, services, or programs.

(2) All tuition and fees described in this section, and any proposed changes to such tuition and fees, must be prominently posted on the state university's website in an area that is transparent and easily accessible. Each state university shall publicly notice and notify all enrolled students of any proposal to change tuition or fees at least 28 days before its consideration for a vote taken at a board of trustees meeting. The notice must:

- (a) Include the date and time of the meeting at which the proposal will be considered.
- (b) Specifically outline the details of existing tuition and fees, including how such tuition and fees are expended, the rationale and necessity for the proposed change, and how the funds from the proposed change will be used.
- (c) Be posted on the university's website and issued in a press release, which must also be enclosed in an e-mail sent to all enrolled students.

(3) Pursuant to section 7(e), Article IX of the State Constitution, any proposal or action of a constituent university to raise, impose, or authorize any fee, as authorized by law, except for tuition, must be approved by at least 9 affirmative votes of the members of the board of trustees of the constituent university, if approval by the board of trustees is required by law, and at least 12 affirmative votes of the members of the Board of Governors, if approval by the Board of Governors is required by law, in order to take effect.

(4) Each university board of trustees is authorized to assess the following fees at the statutory amounts listed:

- (a) Security / Access / Identification Card, Duplicate Security / Access / Identification Card, Fee Card, or Passbook:
 - 1. Annual – cost up to \$10.00.
 - 2. All duplicates – cost up to \$15.00
- (b) Orientation Fee – up to \$35.00.
 - 1. Effective fall 2011, the board of trustees of the University of West Florida may assess a \$50 Orientation Fee.
- (c) Admissions Deposit – Up to \$200. The admissions deposit shall be imposed at the time of an applicant's acceptance to the university and shall be applied toward tuition upon registration and budgeted in the Student and Other Fee Trust Fund. In the event the applicant does not enroll in the university, the admissions deposit shall be budgeted in an

- auxiliary account of the university and used to expand financial assistance, scholarships, student academic and career counseling services, and admission services at the university.
- (d) Transcript Fee – per item; up to \$10.00.
 - (e) Diploma Replacement Fee – per item; up to \$10.00.
 - (f) Service Charge – up to \$15.00 for the payment of tuition and fees in installments.
 - (g) Audit Registration Fees -- Audit registration assures a course space for the student; however, no grade is awarded. This fee is the same as the tuition and associated fees provided in Regulation 7.001. Budgeting of fee proceeds shall be in the Student and Other Fee Trust Fund.
 - (h) Registration of Zero Hours -- Such registration provides for examinations, graduations, use of facilities, etc., when deemed appropriate by the institution. The student is assessed tuition and associated fees for one credit hour. The Zero Credit Fee shall be budgeted in the Student and Other Fee Trust Fund.
 - (i) Application Fee -- Individuals who make application for admission to universities within the State University System shall pay a non-refundable application fee of not more than \$30.00. The fee shall be budgeted in the Student and Other Fee Trust Fund. Provisions may be made to waive the application fee as specified by the university.
 - (j) Late Registration Fee -- Universities shall assess a Late Registration Fee to students who fail to register before the end of the regular registration period. This fee may also be assessed to students reinstated after their course schedules were cancelled due to non-payment of fees. The fee shall be not less than \$50 nor more than \$100 with a minimum of 50 percent budgeted to the Student and Other Fee Trust Funds and the balance budgeted in an Auxiliary Trust Fund. Provisions may be made to waive the Late Registration Fee as specified by the university.
 - (k) Late Payment Fee -- Universities may assess a Late Payment Fee to students who fail to pay, or make appropriate arrangements for payment (installment payment, deferment, or third-party billing), of tuition and associated fees by the deadline set by each university. The fee shall be not less than \$50 nor more than \$100 with a minimum of 50 percent budgeted to the Student and Other Fee Trust Fund and the balance budgeted in an Auxiliary Trust Fund. Provisions may be made to waive the Late Payment Fee as specified by the university.
- (5) Before the board's last meeting of each calendar year, the university board of trustees shall notify the board of any potential increases in fees outlined in subparagraph (4). A university board of trustees may then submit a proposal for an increase in that fee to the Board of Governors' budget committee for consideration by the committee during a June meeting.
- (a) The proposal shall be submitted in a format designated by the chancellor and include at a minimum:
 - 1. The current and proposed increase to the fee and a description of the

process used to determine the need for the increase, including any student involvement.

2. The service or operation currently being funded by the fee.
 3. An analysis of whether the service or operation can be performed more efficiently to alleviate the need for any increase.
 4. The additional or enhanced service or operation to be implemented.
 5. Identification of other resources that could be used to meet this need.
 6. The financial impact on students, including those with financial need.
 7. The current revenue collected and expenditures from the current fee.
 8. The estimated revenue to be collected and expenditures for the fee increase.
- (b) The board will act upon the budget committee recommendation at the next scheduled meeting.
- (c) An increase in these fees can only be implemented with the fall term.

Every five years the university board of trustees shall review the fee increase to determine if the fee has met its intended outcomes and whether the fee should be increased, decreased or discontinued. The university board of trustees shall submit its findings to the board. Any subsequent decreases or continuation in these fees are delegated to the university board of trustees, with notification to the chancellor.

(6) Each university board of trustees is authorized to establish separate activity and service, health, and athletic fees on the main campus, branch campus, or center.

- (a) The fees shall be retained by the university and paid into the separate activity and service, health, and athletic funds. A university may transfer revenues derived from the fees authorized pursuant to this section to a university direct-support organization of the university to be used only for the purpose of paying and securing debt on projects approved pursuant to section 1010.62, Florida Statutes and pursuant to a written agreement approved by the Board of Governors. The amount transferred may not exceed the amount authorized for annual debt service pursuant to section 1010.62, Florida Statutes.
- (b) The sum of the activity and service, health, and athletic fees a student is required to pay to register for a course shall not exceed 40 percent of the tuition. Within the 40 percent cap, universities may not increase the aggregate sum of activity and service, health, and athletic fees more than 5 percent per year or the same percentage increase in tuition, whichever is higher.
- (c) A university may increase its athletic fee to defray the costs associated with changing National Collegiate Athletic Association divisions. Any such increase in the athletic fee may exceed both the 40 percent cap and the 5 percent cap imposed by this subsection. Any such increase must be approved by the athletic fee committee in the process outlined in subparagraph (4)(d) and cannot exceed \$2 per credit hour.
- (d) Increases in the health, athletic, and activity and service fee must be recommended by a fee committee, at least one-half of whom are students

appointed by the student body president. The remainder of the committee shall be appointed by the university president. A chairperson, appointed jointly by the university president and the student body president, shall vote only in the case of a tie. The recommendations of the committee shall take effect only after approval by the university president, after consultation with the student body president, and approval by the university board of trustees. An increase in these fees may occur only once each fiscal year and must be implemented beginning with the fall term.

The student activity and service fee shall be expended for lawful purposes to benefit the student body in general. This shall include, but shall not be limited to, student publications and grants to duly recognized student organizations, the membership of which is open to all students at the university without regard to race, sex, or religion. The fee may not benefit activities for which an admission fee is charged to students, except for student-government-association-sponsored concerts. The allocation and expenditure of the fees shall be determined by the student government association of the university, except that the president of the university may veto any line item or portion thereof within the budget when submitted by the student government association legislative body. The university president shall have 15 school days from the date of presentation of the budget to act on the allocation and expenditure recommendations, which shall be deemed approved if no action is taken within the 15 school days. If any line item or portion thereof within the budget is vetoed, the student government association legislative body shall within 15 school days make new budget recommendations for expenditure of the vetoed portion of the fees. If the university president vetoes any line item or portion thereof within the new budget revisions, the university president may reallocate by line item that vetoed portion to bond obligations guaranteed by activity and service fees.

- (e) Unexpended fees and undisbursed fees remaining at the end of a fiscal year shall be carried over and remain in the student activity and service fund and be available for allocation and expenditure during the next fiscal year.

(7) Technology Fee – Each university board of trustees may establish a technology fee to be paid by all students. The fee may be up to 5 percent of the tuition charged per credit hour. The revenue from this fee shall be used to enhance instructional technology resources for students and faculty. The revenue and expenditures shall be budgeted in the Local Fund budget entity.

(8) Off-Campus Educational Activities - As used herein, "off-campus" refers to locations other than state-funded main campuses, branch campuses, or centers. Each university board of trustees is authorized to establish fees for state fundable off-campus course offerings when the location results in specific, identifiable increased costs to the university. These fees will be in addition to the tuition and associated fees charged to students enrolling in these courses on-campus. The additional fees charged are for the purpose of recovering the increased costs

resulting from off-campus vis-à-vis on-campus offerings. The university shall budget the fees collected for these courses to the Student and Other Fee Trust Funds. Each university shall use the additional fees collected to cover the increased cost of these courses and reimburse the appropriate Educational and General fund, or other appropriate fund if the costs are incurred in other than Educational and General funds.

(9) Material and Supply Fees - Each university board of trustees is authorized to assess Material and Supply Fees not to exceed the amount necessary to offset the cost of materials or supply items which are consumed in the course of the student's instructional activities, excluding the cost of equipment and equipment repairs and maintenance. Revenues from such fees shall be budgeted in the Auxiliary Trust Fund.

(10) Housing Rental Rates - Basic rates for housing rental shall be set by each university board of trustees. In addition, the university board of trustees is authorized to establish miscellaneous housing charges for services provided by the university at the request of the students.

(11) Parking Fines, Permits and Decals -- Each university board of trustees shall establish charges for parking decals, permits and parking fines.

(12) Transportation Access Fee - Each university board of trustees is authorized to establish a transportation access fee, with appropriate input from students, to support the university's transportation infrastructure and to increase student access to transportation services.

(13) Returned Check Fee -- Each university board of trustees shall assess a service charge for unpaid checks returned to the university.

(14) Collection costs -- Each university board of trustees is authorized to assess a charge representing reasonable cost of collection efforts to effect payment for overdue accounts. Amounts received for collection costs shall be retained by the university.

(15) Service Charge -- Each university board of trustees is authorized to assess a service charge on university loans in lieu of interest and administrative handling.

(16) Educational Research Center for Child Development Fee -- Each university board of trustees is authorized to assess child care and service fees.

(17) Transient Student Fee - Each university board of trustees is authorized to assess a fee not to exceed \$5.00 per course for accepting a transient student and processing the student's admissions application pursuant to Section 1006.73.

(18) Capital Improvement Fee - This fee may be used to fund any project or real property acquisition that meets the requirements of Chapter 1013. Each university board of trustees shall assess \$4.76 per credit hour per semester. Any

increase in the fee beyond \$4.76 must be first recommended by a fee committee, at least half of whom are students appointed by the student body president. The remainder of the committee shall be appointed by the university president. A chairperson, appointed jointly by the university president and the student body president, shall vote only in the case of a tie. The recommendations of the committee shall take effect only after approval by the university president, after consultation with the student body president, and approval by the university board of trustees. An increase in these fees may occur only once each fiscal year and must be implemented beginning with the fall term. The fee may not exceed 10 percent of the tuition for resident students or 10 percent of the sum of tuition and out-of-state fees for nonresident students. The fee for resident students shall be limited to an increase of \$2 per credit hour over the prior year, and any proposed fee increases or decreases must be approved by the Board of Governors. No project proposed by a university which is to be funded by this fee shall be submitted to the Board of Governors for approval without prior consultation with the student government association of that university.

(19) Student Financial Aid Fee – Each university board of trustees is authorized to collect for financial aid purposes an amount not to exceed 5 percent of the tuition and out-of-state fee. The revenues from fees are to remain at each university. A minimum of 75 percent of funds from the student financial aid fee shall be used to provide financial aid based on demonstrated financial need. Each university shall report annually to the Board of Governors on the revenue collected pursuant to this subsection, the amount carried forward, the criteria used to make awards, the amount and number of awards for each criterion, and a delineation of the distribution of such awards. The report shall include an assessment by category of the financial need of every student who receives an award, regardless of the purpose for which the award is received. Awards which are based on financial need shall be distributed in accordance with the federal methodology for determining need. An award for academic merit shall require a minimum overall grade point average of 3.0 on a 4.0 scale or the equivalent for both initial receipt of the award and renewal of the award.

(20) Each university board of trustees is authorized to assess the following fees which will have varied amounts:

- (a) Development Research School Fees – activity fees which shall be discretionary with each university.
- (b) Library Fines – per book or unit, per day; the funds shall be budgeted to the Student and Other Fee Trust Fund.
- (c) Overdue Reserve Library books – per book, per library hour; the funds shall be budgeted to the Student and Other Fee Trust Fund.
- (d) Late Equipment Fee, Physical Education – per item, per day.
- (e) Fees and fines relating to the use, late return, and loss and damage of facilities and equipment.
- (f) Distance Learning Fee - Universities may assess a distance learning fee to any student enrolled in a course listed in the distance learning catalog. The average distance learning fee amount assessed by a state university may not exceed \$30 per credit hour.

(21) Each university board of trustees is authorized to assess reasonable fees for incidental non-academic services provided directly to individuals. This could include, but not be limited to, fees for duplicating, lost keys, copyright material, breakage, standardized tests, library loans.

(22) Each university board of trustees is authorized to assess an international student service fee to cover the university costs associated with reporting requirements of the Student and Exchange Visitor Information System administered by the Department of Homeland Security for F-Visa and J-Visa degree seeking students.

(23) Excess Hour Fee –This fee shall be budgeted in the Student and Other Fee Trust Fund.

- (a) State universities shall require a student to pay an excess hour surcharge for each credit hour in excess of the number of credit hours required to complete the baccalaureate degree program in which the student is enrolled. Each university must calculate an excess hour threshold for each student based on the number of credit hours required for the degree. For any student who changes degree programs, the excess hour threshold must be adjusted only if the number of credit hours required to complete the new degree program exceeds that of the original degree program.
- (b) All state university undergraduate students who entered a postsecondary undergraduate program at any Florida public institution of higher education as a first-time-in-college student in fall 2009 or thereafter and prior to fall 2011 shall pay an excess hour fee equal to 50 percent of the undergraduate tuition identified in Regulation 7.001(3) for each credit hour in excess of 120 percent of the number of credit hours required to complete the baccalaureate degree program in which the student is enrolled.
- (c) All state university undergraduate students who entered a postsecondary undergraduate program at any Florida public institution of higher education as a first-time-in-college student in fall 2011 and prior to fall 2012 shall pay an excess hour fee equal to 100 percent of the undergraduate tuition identified in Regulation 7.001(3) for each credit hour in excess of 115 percent of the number of credit hours required to complete the baccalaureate degree program in which the student is enrolled.

All state university undergraduate students who entered a postsecondary undergraduate program at any Florida public institution of higher education as a first-time-in-college student in fall 2012 through the 2019 spring term shall pay an excess hour fee equal to 100 percent of the undergraduate tuition identified in Regulation 7.001(3) for each credit hour in excess of 110 percent of the number of credit hours required to complete the baccalaureate degree program in which the student is enrolled. For the 2019 summer term and thereafter, an excess hour surcharge equal to 100 percent of the tuition rate for each credit hour in excess of 120 percent shall

be paid. Effective July 1, 2018 each university shall refund the excess hour surcharge assessed for up to 12 credit hours to any first-time-in-college student who completes a baccalaureate degree program within four years after their initial enrollment in a university.

(d) Each university shall implement a process for notifying students of this fee upon a student's initial enrollment. A second notice must be provided to the student when the student has attempted the number of credit hours needed to complete the baccalaureate degree program in which the student is enrolled. The second notice must include a recommendation that each student who intends to earn credit hours at the university in excess of the credit hours required for the baccalaureate degree program in which the student is enrolled meet with the student's academic advisor. The excess hours' determination shall be based on the baccalaureate degree program in which the student is enrolled. If a student changes degree programs, the excess hours' threshold shall be adjusted to the new program's required hours. Pursuant to Regulation 7.002(1), the university shall establish regulation procedures for the implementation of this section.

(e) All credit hours for courses taken at the university from which the student is seeking a baccalaureate degree shall be included when calculating the number of hours taken by a student, including:

1. Failed courses.
2. Courses dropped or withdrawn from after the university's advertised last day of the drop and add period, except as provided for in subparagraph (21)(f).
3. Repeated courses, except repeated courses for which the student has paid the full cost of instruction as provided in Regulation 7.001(12).
4. All credit hours earned at another institution and accepted for transfer by the university and applied toward the student's baccalaureate degree program.

(f) All credit hours earned under the following circumstances shall not be calculated as hours required to earn a baccalaureate degree:

1. College credits earned through an articulated accelerated mechanism.
2. Credit hours earned through internship programs.
3. Credit hours required for certification, recertification, or certificate programs.
4. Credit hours in courses from which a student must withdraw due to reasons of medical or personal hardship.
5. Credit hours taken by active-duty military personnel.
6. Credit hours required to achieve a dual major taken while pursuing a baccalaureate degree.
7. Remedial and English as a Second Language credit hours.

8. Credit hours earned in military science courses that are part of the Reserve Officers' Training Corps program.
9. Credit hours earned or taken for the civics literacy competency requirement.

(24) Convenience fee – Each university board of trustees may establish a convenience fee when accepting payments by credit cards, charge cards, and debit cards. The fee shall not be greater than the cost of providing the service. The fee is not refundable to the payor.

(25) A university board of trustees may submit a proposal for a new fee not currently authorized in board regulation or statute to the Board of Governors' budget committee for consideration by the committee during a June meeting. The deadline for submission of a proposal shall be determined by the Board Office.

- (a) The proposal shall be submitted in a format designated by the chancellor, and include at a minimum:
 1. The purpose to be served or accomplished with the fee.
 2. The demonstrable student-based need for the fee that is currently not being met through existing university services, operations or another fee.
 3. The process used to assure substantial student input or involvement.
 4. Any proposed restrictions, limitations, or conditions to be placed on the fee.
 5. The financial impact of the fee on students, including those with financial need.
 6. The estimated revenue to be collected and proposed expenditures for the new fee.
 7. The outcome measures that will be implemented to determine when the purpose of the fee will be accomplished.
- (b) The aggregate sum of any fees approved by the board that a student is required to pay to register for a course shall not exceed 10 percent of tuition. All other fees shall be based on cost.
- (c) The fee can only be implemented in the fall term.
- (d) The revenue generated by this fee may not be transferred to an auxiliary enterprise or a direct-support organization and may not be used to pay or secure debt.
- (e) The university shall account for the revenue and detailed expenditures of this fee in the Annual Report.
- (f) The fee cannot be an extension of, or cover the same services, as an existing statutory fee.
- (g) The fee cannot be utilized to create additional bonding capacity in an existing fee.

- (h) The fee should support a new service or activity that is not currently supported or should be supported with education and general funds (state and tuition).
- (i) The fee shall not supplant revenue from other sources that are currently used or have been used to support a service or activity.
- (j) The fee should support a service or activity in which a majority of students is able to participate or from which derive a benefit.
- (k) Once the board approves a fee under this section, a university fee committee shall be established similar to other existing fee committees.
- (l) The board will act upon the budget committee recommendation at the next scheduled meeting.
- (m) Every five years the university board of trustees shall review the fee to determine if the fee has met its intended outcomes and whether the fee should be increased, decreased or discontinued. The university board of trustees shall submit its findings to the board. Any subsequent decreases or continuation in these fees are delegated to the university board of trustees, with notification to the chancellor.
- (n) If a university board of trustees' proposal is denied, within five calendar days the university board of trustees may request reconsideration by the board's Tuition Appeals Committee, which shall consist of the chair of the board and the chair of each board committee. The Tuition Appeals Committee will meet within ten calendar days after the Board of Governors denial to consider a university board of trustees request for reconsideration.

(26) Pursuant to subparagraph (24), the university boards of trustees designated below are authorized to assess the following fees:

(a) Green Fee – This fee may be assessed to establish or improve the use of renewable energy technologies or energy efficiencies that lower the university's greenhouse emissions.

1. University of South Florida: up to \$1.00 per credit hour
2. New College of Florida: up to \$1.00 per credit hour
3. University of West Florida: up to \$1.00 per credit hour

(b) Test Preparation Fee – at cost. This fee may be assessed to increase accessibility to test preparation courses in programs where students are expected to obtain specific preparation for a practice-based examination.

1. Florida International University
2. Florida A&M University – (bar test preparation)

(c) Student Life and Services Fee – This fee may be assessed to expand student participation in transformational learning opportunities that build new and enhances ongoing activities which connect students to the institution.

1. University of North Florida: not to exceed 5 percent of tuition.

Authority: Section 7(d), Art. IX, Fla. Const.; History—Formerly BOR Rule 6C-7.003. Derived from 6C-2.74 and 6C-2.76, Amended and Renumbered 12-17-74, Amended 2-22-76, 6-22-76, 6-28-76, 11-1-76, 9-8-77, 2-14-79, 9-28-81, 12-7-82, 12-13-83, 10-2-84, Formerly 6C-7.03, Amended 1-8-86, 8-11-86, 12-25-86, 6-2-87, 10-17-89, 4-10-90, 1-7-91, 7-2-91, 9-15-91, 8-4-92, 11-9-92, 4-12-93, 5-30-93, 9-23-93, 8-1-94, 1-24-96, 4-16-96, 12-15-97, 8-28-00, 8-12-01, Amended and Renumbered as 7.003 9-25-08, Amended 12-10-09, 11-4-10, 9-15-11, 6-21-12, 11-08-12, 11-21-13, 9-22-16, 11-8-18, 10-30-2019, 9-1-2021, 8-26-22.

**Board of Trustees
Full Board Meeting
September 18, 2025**

Presidential Search: Position Criteria

Recommended Action:

Approve the Presidential position criteria.

Background Information:

The Presidential Search Committee was tasked, in accordance with BOG Regulations 1.002, with developing recommended position criteria that are consistent with the institution's mission, strategic plan and aspirational goals. Funk Associates, one of the nation's premier firms dedicated to higher education search consulting, was retained to assist the committee. On August 26, 2025, and August 27, 2025, the Presidential Search Committee Chair and the search consultant hosted a series of open forums and listening sessions with key university stakeholders to solicit input and guidance. These sessions provided an opportunity for various UWF community constituents to share their thoughts and comments on the qualities and characteristics sought in the new President. The information gathered in these sessions was used to develop the position profile and assisted the Presidential Search Committee in finalizing the criteria by which candidates will be evaluated. The Presidential Search Committee met on September 4, 2025, to review and approve the recommended Presidential position criteria.

Implementation Plan:

Once approved, the search consultants will place advertisements in the list of outlets in the marketing plan. The position criteria will also be posted on the Presidential Search Website and share with potential applicants.

Fiscal Implications:

N/A

Relevant Authority:

BOG Regulation 1.002 Presidential Search and Selection

Supports Strategic Direction(s):

Strategic Direction 2: Employee Success

Supporting Documents:

1. Position Criteria
2. BOG Regulation 1.002 Presidential Search and Selection

Prepared by:

Candace Freeman, Presidential Search Committee Staff, Human Resources

Presenter:

Zack Smith, UWF Presidential Search Committee Chair

Presidential Search Criteria

University of West Florida

Introduction

The University of West Florida (UWF), a student-centered and Community Engaged Carnegie R2 public institution in the vibrant Gulf Coast city of Pensacola, Florida, seeks a dynamic leader to serve as its 7th President. UWF is an institution of significant and growing importance with an enrollment of over 15,000 and a commitment to academic excellence, workforce development and service to Northwest Florida.

Leadership Qualities and Experience

The ideal candidate for the UWF Presidency will demonstrate the following qualities and experiences:

- **Servant Leadership:** The ability to work collaboratively to articulate and implement a bold and innovative mission-aligned vision for UWF's future, ensuring continued growth and expanding regional impact.
- **Commitment to Academic Excellence:** An understanding of the academic enterprise including teaching, research, and faculty development.
- **Strategic Fundraising & Financial Stewardship:** Proven ability to lead successful fundraising campaigns, build partnerships, and ensure responsible financial management to support a growing university.
- **Student-Centered Approach:** Commitment to enhancing student success, improving retention and graduation rates, and ensuring accessibility and affordability.
- **Community and Government Relations:** Experience in engaging with local, state, and federal officials, as well as strengthening relationships with the Northwest Florida community.
- **Executive Experience:** A record of successful leadership in a complex organization, preferably in higher education, government, or a large nonprofit entity.

Key Institutional Priorities

The next President of UWF will be responsible for advancing several key priorities:

1. **Elevating Student Success and Experience**
 - Improve student retention, graduation rates, and career placement opportunities.
 - Promote initiatives that provide targeted support for military and other students.

2. **Continuing to Support Academic Excellence and Faculty Research**
 - Continue to align academic programs with regional need while also supporting the R2, Community Engaged research mission.
3. **Deepening Community Engagement and Partnerships**
 - Foster meaningful partnerships with businesses, local government, military, and nonprofit organizations.
 - Strengthen UWF's status as a school of choice in the region and beyond.
4. **Strengthening Financial Sustainability**
 - Develop and implement strategies to diversify revenue streams and optimize resource allocation.
 - Work with government and well as private industry to pursue grant and public-private partnership opportunities
 - Lead capital campaigns and philanthropic initiatives to support scholarships, faculty endowments, and infrastructure improvements.
5. **Aligning with the State University System of Florida Strategic Plan**
 - SUS 30, Extraordinary Impact lays out five pillars led by a One System principle encompassing the 12 distinct institutions in the state. The other four are Elevating student success; Operational excellence; World-Class talent; and Innovative Research and Development. The next President will lead UWF to continue moving forward with a thoughtfully tailored role in pushing forward on those principles.

Desired Qualifications

Candidates should possess:

- A relevant graduate degree is preferred but not required.
- A distinguished record of leadership, preferably in higher education, public service, or business.
- Strong communication and interpersonal skills, with experience working with diverse stakeholders to achieve local, regional, and national goals.
- A deep appreciation for UWF's mission, culture, and role in the state of Florida and beyond.
- A passion and excitement for the university's ability to change the lives of its students.

Application Process

The Search Committee welcomes nominations and applications from individuals who meet these criteria. Review of applications will begin immediately and continue until the position is filled. Confidential inquiries and nominations should be directed to Funk Associates via email to krisha.creal@funkassociates.com.

1.002 Presidential Search and Selection

(1) Pursuant to a delegation of authority from the Board of Governors, each board of trustees is responsible for conducting a search and selecting a candidate to serve as the president of the institution, subject to confirmation of the candidate by the Board of Governors. To ensure that the search process is transparent, effective, and consistent with state law and with the priorities of the Board of Governors and the constituent university, each university board of trustees must conduct the search process in accordance with the following criteria:

(a) The Chair of the board of trustees, in consultation with the Chair of the Board of Governors, as ex officio member of the search committee for the limited purpose of completing (1)(c)(9), shall appoint the members of a search committee comprised of no more than 15 members, two of whom must be the Chair of the Board of Governors' designees, which will consist of a member of the Board of Governors and a committee member at-large, and at least three of whom are members of the board of trustees. Committee members selected to serve on the search committee should consist of individuals from the institution's faculty, the student body, the institution's foundation board, and, if applicable, the institution's financing corporation board. However, none of the individuals selected to serve on the search committee should hold positions that report directly to the president. In addition, the Chair of the board of trustees should consider appointing alumni, donors, and/or members from the community where the institution is located to serve on the search committee. The Chair of the board of trustees will appoint, with the concurrence of the Chair of the Board of Governors, a trustee member of the search committee to serve as chair of the committee. The Chair of the board of trustees may not serve as the search committee chair.

(b) The board of trustees or its designee:

1. shall obtain an executive compensation analysis that encompasses all components of compensation (salary, benefits, bonuses, and all other forms of remuneration) and that takes into consideration compensation paid to the current president, presidents of peer institutions, as well as other relevant factors (such as market trends, the available qualified pool and relevant competition for candidates), from which the search committee will establish a range of compensation that will be submitted to the board of trustees for approval and use by the board of trustees or its designee in negotiating the employment contract with the final candidate; may retain the services of an executive search firm/consultant, subject to a competitive procurement process or use of a competitively procured, pre-qualified list, if total compensation will exceed the threshold established in Board Regulation 18.001; and any search firm/consultant that is retained must confirm, in writing, that it is familiar with and will comply with Florida's Sunshine laws in chapters 119 and 286, Florida Statutes, and the confidentiality requirements in section 1004.098, Florida Statutes, applicable to executive searches; and
2. shall provide a charge to the search committee that outlines the scope of the search, the estimated timeline for the search, and the committee's responsibilities.

(c) The search committee, assisted by the executive search firm/consultant (if retained), will be responsible for:

1. oversight of a webpage on the institution's website that includes a link to the home page for meetings related to the search and information on the means of providing stakeholder input, which shall be maintained for purposes of transparency;
2. establishing a calendar of public events for the process as they are planned that takes into account the need to align the timing of the selection process with the estimated timeline specified by the board of trustees to the extent feasible, and meeting dates of the board of trustees, and of the Board of Governors for purposes of the confirmation process;
3. developing recommended position criteria that are consistent with the institution's mission, strategic plan and aspirational goals, which shall be approved by the board of trustees;
4. approving a marketing plan, that will be submitted to the board of trustees;
5. identifying individuals who may apply, be nominated, or recruited, taking into consideration their experience, qualifications and leadership capabilities under the position criteria to produce a pool of qualified applicants;
6. vetting applicants by, at a minimum, ensuring that:
 - i. the committee reviews, as soon as possible but no later than seven (7) days prior to the interview of any applicant, available public records and online resources in order to narrow the pool of qualified applicants who will be invited to participate in interviews with the search committee;
 - ii. any issues of concern identified in the public records or online resources are shared with and addressed by the committee and applicant, prior to the applicant being advanced to the board of trustees;
 - iii. the references of candidates to be referred to the board of trustees are thoroughly checked and reviewed by the committee prior to advancing applicants to the board of trustees;
 - iv. any information solicited from applicants in the vetting process is necessary to conduct a background check, or is germane to the position description.
7. determining, under the position criteria, the applicants to be interviewed by the search committee, which may be accomplished, for example, by categorizing applicants from highly qualified to unqualified and conducting a ranking or series of rankings of the applicants to determine where there is consensus. Any ranking process must be completed by search committee members, during a meeting, on the record and where contemporaneous discussion of such rankings can

- take place;
8. conducting those first applicant interviews, based on the format and parameters set forth by the committee. If the interviews are in-person, at least one board of trustees committee member must attend the interviews in person. The committee will utilize the same preliminary questions for each applicant and is authorized to include additional applicant-specific questions related to the applicant's submitted materials or background vetting findings obtained through public records or online resources;
 9. recommending an unranked list of final applicants who are qualified under the position criteria to further the institution's mission, goals and priorities for on-campus meetings or forums with faculty, students, and other stakeholders and for consideration and on-campus interviews by the board of trustees, subject to the prior review and approval by the Chair of the Board of Governors. The search committee is required to submit more than two qualified applicants, selected by a majority vote of the search committee, to the board of trustees for consideration, other than in exceptional circumstances making fulfillment of this requirement infeasible, in which case the committee must discuss why fewer than three applicants are being recommended and whether additional applications should be considered. If more than two candidates are not coming forward, the board of trustees must be notified of the reason and may decline to act;
 10. informing all members of the committee if any applicant withdraws from consideration prior to the board of trustees' consideration of finalists; and
 11. notifying the search committee chair and the Chancellor if, at any time during the search committee process, a member identifies concerns or issues related to the process or the search committee's compliance with law or Board of Governors regulations. The Chancellor, in consultation with the Chair of the Board of Governors and Board of Governors' General Counsel, will issue guidance on the appropriate course of action.
- (d) The board of trustees or its designee, with the assistance of the executive search firm/consultant (if retained), shall then be responsible for:
1. ensuring that at least a preliminary criminal, financial, education and professional background check is conducted for the final applicants who are recommended by the search committee to interview with the board of trustees; ensuring that additional screening of those applicants is conducted by contacting other persons or entities that can provide additional information relevant to the position criteria on the applicant's job performance in his or her current and past positions, an assessment of the applicant's leadership capabilities and management style, ability to work with various stakeholders, and expected effectiveness as an advocate for the institution and the State University System; and

ensuring that a background check of the president-elect is finalized prior to recommendation of the president-elect to the Board of Governors for confirmation;

2. holding on-campus meetings with faculty, students, and other stakeholders and conducting final interviews with the board of trustees;
3. selecting a final qualified candidate under the position criteria as president-elect for recommendation to the Board of Governors for confirmation;
4. drafting an employment contract covering the financial and key performance terms, to be reviewed by the Board of Governors general counsel prior to execution for compliance with state law, that is consistent with the compensation range approved by the board of trustees, that is contingent upon confirmation of the candidate by the Board of Governors; and includes an express bonus structure that is in alignment with key performance terms. It is recommended that the terms be consistent with the university's performance based funding metrics and accountability plan, but universities are not limited to these standards. If a university chooses alternative criteria, such criteria and an estimated timeframe for the determination of the criteria must be communicated to the Board of Governors; and
5. submitting a written description of the selection process and criteria, the president-elect's qualifications, and a copy of the employment contract to the Board of Governors for consideration in the confirmation process. The president-elect is not eligible to commence employment with the institution or execute the employment contract prior to confirmation by the Board of Governors.

(2) The Board of Governors' member who serves on the search committee shall be responsible for:

- (a) reporting on the progress of the search and selection process at each regularly scheduled meeting of the Board, and shall serve as a member of any search committee subcommittee established for the purpose of analyzing the appropriate range of compensation for the final candidate. As part of the member's report to the Board, the member will keep the Board informed on matters relating to the range of compensation and other material terms of any proposed employment contract discussed by the search committee or the board of trustees during the search process; and
- (b) informing the search committee at a scheduled meeting of the committee of concerns raised by members of the Board of Governors related to compensation or other material terms of proposed employment contracts.

(3) All persons with access to confidential applicant information protected by section 1004.098, Florida Statutes, shall execute a non-disclosure agreement to ensure confidentiality of the information as required by law. Failure to abide by the requirements of the non-disclosure agreement may subject an individual to civil or criminal penalties under Florida's Sunshine Laws.

(4) The Chancellor shall brief the president-elect in preparation for the meeting at which the president-elect shall be presented to the Board of Governors for confirmation.

(5) The president-elect shall personally appear before the Board of Governors at a scheduled meeting for an interview as part of the confirmation process. The Chair of the board of trustees, or designee, will describe the search process and the material terms of the proposed employment contract, and introduce the president-elect to the Board. The president-elect should be prepared to respond to questions related to the institution's mission under its strategic plan, general awareness of institutional and system metrics, and any priorities established by the Board of Governors for the institution.

(6) Amendments to this regulation are effective to active presidential searches and are applicable prospectively.

Authority: Section 7(d), art. IX, Fla. Const.; Fla. Stat. 1001.706, 1004.098; History: New 06-23-16, Amended 08-31-17, Amended 11-09-22, Amended 09-08-23, Amended 03-27-24, Amended 10-18-24.

Board of Trustees
Full Board Meeting
September 18, 2025**Presidential Search: Compensation**

Recommended Action:

Approve the recommended compensation range of \$800,000 to \$1.2 million and to delegate authority to the UWF Board of Trustees Chair to negotiate the employment contract with the final presidential candidate.

Background Information:

The Presidential Search Committee was tasked with recommending a compensation range to attract and retain top-tier presidential candidates. Funk Associates, one of the nation's premier firms dedicated to higher education search consulting, was retained to assist the committee. The Presidential Search Committee met on September 4, 2025, to review and approve the recommended compensation plan. The Presidential Search Committee is recommending a compensation range of \$800,000 to \$1.2 million.

Implementation Plan:

The search consultants will share the total compensation range with any potential applicants. Once a finalist is selected, the Board of Trustees or its designee will negotiate the employment contract with the final candidate.

Fiscal Implications:

Recommended compensation range of \$800,000 to \$1.2 million.

Relevant Authority:

BOG Regulation 1.002 Presidential Search and Selection

Supports Strategic Direction(s):

Strategic Direction 2: Employee Success

Supporting Documents:

1. Compensation Plan
2. BOG Regulation 1.002 Presidential Search and Selection

Prepared by:

Candace Freeman, Presidential Search Committee Staff, Human Resources

Presenter:

Zack Smith, UWF Presidential Search Committee Chair

Briefing Note

Purpose

To provide the Board of Trustees with recent data on presidential compensation at (1) Florida public universities, (2) UWF's identified peer institutions, and (3) UWF's aspirant institutions. This information is intended to inform compensation discussions as the University of West Florida undertakes its presidential search.

Overview of Data Sources

- **Florida Public Universities (2024–25):** Compensation figures derived from Board of Trustees minutes, state salary databases, and recent contract announcements.
 - **Peer and Aspirant Institutions:** Data compiled from The Chronicle of Higher Education's 2024 survey of presidential pay, supplemented with state salary databases, press releases, and public board records where available.
 - **Breakdown:** Where possible, data are separated into **base salary** and **total compensation** (including allowances, deferred compensation, and incentives).
-

Key Findings

- **Florida Context:** Presidential compensation among the State University System of Florida institutions range widely, but the most recent contracts (2025) show the range of total compensation from **\$810,000 (FAMU) to \$1,701,982 (UCF)**. That range – and the salaries beyond that range – reflect a difference in institutional scale and visibility.
 - **UWF** data shows previous President Martha Saunders with a compensation package of \$784,000, and interim President Manny Diaz Jr.'s compensation at \$744,000.
 - Comprehensive compensation data is not as readily available in other states the way it is in the state of Florida. The in-state data annualizes deferred compensation and other benefits and will be the most complete view of Presidential compensation.
 - **Peer and Aspirant Institution** data generally captures *only* base salary, and those institutions generally have longer-tenured leaders than those in the state of Florida. As a result, those figures may be relatively compressed.
 - **Trend:** Across the sector, boards are increasingly using **performance-based incentives and deferred compensation** to attract and retain leadership, supplementing base salary.
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Prepared by:

Willie Funk
Funk Associates



UNIVERSITY *of*
WEST FLORIDA

PRESIDENTIAL SALARY SURVEY

University of West Florida
Peer, Aspirant, and Florida Institutions

Any recommended compensation range will comply with Fla. Stat. § 1012.976 and BOG Reg. 9.006 (public-funds cap of \$200,000 for presidents), Fla. Stat. § 1012.978 (bonus reporting), and Fla. Stat. § 215.425 (severance capped at 20 weeks), with supplementation from DSO or private sources as permitted.

State of Florida Universities

Institution	President	Effective Date	Base Salary	Max Bonus/ Incentive	Other/Deferred	Total Reported Comp
University of Florida	Donald W. Landry (Interim)	Sept 1, 2025	1,000,000*	n/a	n/a	\$1,000,000*
Florida State University	Richard McCullough	Latest reports 2024	1,100,000	550,000	475,000	\$2,137,000
University of Central Florida	Alexander N. Cartwright	Apr 13, 2025	900,000	375,000	411,667	\$1,701,982
University of South Florida	Rhea Law	Sept 2024	825,000	412,500	206,250	\$1,539,750
Florida International University	Jeanette Nuñez	2025	925,000	400,000	n/a	\$1,325,000
Florida Atlantic University	Adam Hasner	2025	875,000	150,000	19,800	\$1,144,800
University of North Florida	Moez Limayem	2022	500,000	n/a	60,000	\$560,000
Florida Gulf Coast University	Aysegul Timur	2023–	500,000	100,000	60,000	\$660,000
Florida A&M University	Marva Johnson	2025	650,000	86,000	300,000 over 5 years + 14,400/yr	\$810,400
New College of Florida	Richard Corcoran	2023–	699,000	200,000	96,000 + 100,000 + 400,000 over 5 yr	\$995,000
Florida Polytechnic University	G. Devin Stephenson	2024-25	490,000	147,000	98,400	Approved range: \$782,000 - 1,224,000

*This salary data is for the previous interim president since no comp information for the new president is publicly available.

Peer Institutions

Institution	President	Base Salary	Max Bonus/ Incentive	Total Compensation
Arkansas State University	Todd Shields	459,000	50,000	\$467,202
Bowling Green State University - Main Campus	Rodney Rodgers	526,600	15% of Salary	\$681,759
Louisiana Tech University	Jim Henderson	450,000	132,000 Foundation Supplement	\$582,000
Oakland University	Ora Pescovitz	n/a	n/a	\$570,860
Southern Illinois University Edwardsville	James Minor	n/a	n/a	\$340,000.08
Tarleton State University	James Hurley	n/a	n/a	\$529,147
University of Missouri-St. Louis	Kristin Sobolik	n/a	n/a	\$466,243
University of North Carolina at Greensboro	Franklin Gilliam	n/a	n/a	\$451,926
Western Kentucky University	Tim Caboni	\$524,700 + 10% Bonus	10% of Salary	\$577,170
Western Washington University	Sabah Randhawa	n/a	n/a	\$506,284

Aspirant Institutions

Institution	President	Base Salary	Max Bonus/ Incentive	Total Compensation
Appalachian State University	Heather Hulburt	n/a	n/a	Not Available, recent appt.
Ball State University	Geoffrey Means	619,715	n/a	\$619,715
Grand Valley State University	Philomena Mantella	500,000	n/a	\$500,000
Illinois State University	Aondover Tarhule	450,000	50,000 retirement + 20,000 other	\$520,000
James Madison University	James Schmidt	610,000	91,500	\$701,500
Kent State University	Todd Diacon	534,771.72	n/a	\$534,771.72
Miami University at Oxford	Greg Crawford	572,335	75,000	\$647,335
Towson University	Mark Ginsberg	633,450	n/a	\$633,450
University of North Carolina at Wilmington	Aswani Volety	400,400	n/a	\$400,400
West Chester University of Pennsylvania	Lorraine Bernotsky (fmr. Provost)	n/a	n/a	n/a



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WEST FLORIDA

PRESIDENTIAL SALARY SURVEY

University of West Florida
Peer, Aspirant, and Florida Institutions

Any recommended compensation range will comply with Fla. Stat. § 1012.976 and BOG Reg. 9.006 (public-funds cap of \$200,000 for presidents), Fla. Stat. § 1012.978 (bonus reporting), and Fla. Stat. § 215.425 (severance capped at 20 weeks), with supplementation from DSO or private sources as permitted.

1.002 Presidential Search and Selection

(1) Pursuant to a delegation of authority from the Board of Governors, each board of trustees is responsible for conducting a search and selecting a candidate to serve as the president of the institution, subject to confirmation of the candidate by the Board of Governors. To ensure that the search process is transparent, effective, and consistent with state law and with the priorities of the Board of Governors and the constituent university, each university board of trustees must conduct the search process in accordance with the following criteria:

(a) The Chair of the board of trustees, in consultation with the Chair of the Board of Governors, as ex officio member of the search committee for the limited purpose of completing (1)(c)(9), shall appoint the members of a search committee comprised of no more than 15 members, two of whom must be the Chair of the Board of Governors' designees, which will consist of a member of the Board of Governors and a committee member at-large, and at least three of whom are members of the board of trustees. Committee members selected to serve on the search committee should consist of individuals from the institution's faculty, the student body, the institution's foundation board, and, if applicable, the institution's financing corporation board. However, none of the individuals selected to serve on the search committee should hold positions that report directly to the president. In addition, the Chair of the board of trustees should consider appointing alumni, donors, and/or members from the community where the institution is located to serve on the search committee. The Chair of the board of trustees will appoint, with the concurrence of the Chair of the Board of Governors, a trustee member of the search committee to serve as chair of the committee. The Chair of the board of trustees may not serve as the search committee chair.

(b) The board of trustees or its designee:

1. shall obtain an executive compensation analysis that encompasses all components of compensation (salary, benefits, bonuses, and all other forms of remuneration) and that takes into consideration compensation paid to the current president, presidents of peer institutions, as well as other relevant factors (such as market trends, the available qualified pool and relevant competition for candidates), from which the search committee will establish a range of compensation that will be submitted to the board of trustees for approval and use by the board of trustees or its designee in negotiating the employment contract with the final candidate; may retain the services of an executive search firm/consultant, subject to a competitive procurement process or use of a competitively procured, pre-qualified list, if total compensation will exceed the threshold established in Board Regulation 18.001; and any search firm/consultant that is retained must confirm, in writing, that it is familiar with and will comply with Florida's Sunshine laws in chapters 119 and 286, Florida Statutes, and the confidentiality requirements in section 1004.098, Florida Statutes, applicable to executive searches; and
2. shall provide a charge to the search committee that outlines the scope of the search, the estimated timeline for the search, and the committee's responsibilities.

(c) The search committee, assisted by the executive search firm/consultant (if retained), will be responsible for:

1. oversight of a webpage on the institution's website that includes a link to the home page for meetings related to the search and information on the means of providing stakeholder input, which shall be maintained for purposes of transparency;
2. establishing a calendar of public events for the process as they are planned that takes into account the need to align the timing of the selection process with the estimated timeline specified by the board of trustees to the extent feasible, and meeting dates of the board of trustees, and of the Board of Governors for purposes of the confirmation process;
3. developing recommended position criteria that are consistent with the institution's mission, strategic plan and aspirational goals, which shall be approved by the board of trustees;
4. approving a marketing plan, that will be submitted to the board of trustees;
5. identifying individuals who may apply, be nominated, or recruited, taking into consideration their experience, qualifications and leadership capabilities under the position criteria to produce a pool of qualified applicants;
6. vetting applicants by, at a minimum, ensuring that:
 - i. the committee reviews, as soon as possible but no later than seven (7) days prior to the interview of any applicant, available public records and online resources in order to narrow the pool of qualified applicants who will be invited to participate in interviews with the search committee;
 - ii. any issues of concern identified in the public records or online resources are shared with and addressed by the committee and applicant, prior to the applicant being advanced to the board of trustees;
 - iii. the references of candidates to be referred to the board of trustees are thoroughly checked and reviewed by the committee prior to advancing applicants to the board of trustees;
 - iv. any information solicited from applicants in the vetting process is necessary to conduct a background check, or is germane to the position description.
7. determining, under the position criteria, the applicants to be interviewed by the search committee, which may be accomplished, for example, by categorizing applicants from highly qualified to unqualified and conducting a ranking or series of rankings of the applicants to determine where there is consensus. Any ranking process must be completed by search committee members, during a meeting, on the record and where contemporaneous discussion of such rankings can

- take place;
8. conducting those first applicant interviews, based on the format and parameters set forth by the committee. If the interviews are in-person, at least one board of trustees committee member must attend the interviews in person. The committee will utilize the same preliminary questions for each applicant and is authorized to include additional applicant-specific questions related to the applicant's submitted materials or background vetting findings obtained through public records or online resources;
 9. recommending an unranked list of final applicants who are qualified under the position criteria to further the institution's mission, goals and priorities for on-campus meetings or forums with faculty, students, and other stakeholders and for consideration and on-campus interviews by the board of trustees, subject to the prior review and approval by the Chair of the Board of Governors. The search committee is required to submit more than two qualified applicants, selected by a majority vote of the search committee, to the board of trustees for consideration, other than in exceptional circumstances making fulfillment of this requirement infeasible, in which case the committee must discuss why fewer than three applicants are being recommended and whether additional applications should be considered. If more than two candidates are not coming forward, the board of trustees must be notified of the reason and may decline to act;
 10. informing all members of the committee if any applicant withdraws from consideration prior to the board of trustees' consideration of finalists; and
 11. notifying the search committee chair and the Chancellor if, at any time during the search committee process, a member identifies concerns or issues related to the process or the search committee's compliance with law or Board of Governors regulations. The Chancellor, in consultation with the Chair of the Board of Governors and Board of Governors' General Counsel, will issue guidance on the appropriate course of action.
- (d) The board of trustees or its designee, with the assistance of the executive search firm/consultant (if retained), shall then be responsible for:
1. ensuring that at least a preliminary criminal, financial, education and professional background check is conducted for the final applicants who are recommended by the search committee to interview with the board of trustees; ensuring that additional screening of those applicants is conducted by contacting other persons or entities that can provide additional information relevant to the position criteria on the applicant's job performance in his or her current and past positions, an assessment of the applicant's leadership capabilities and management style, ability to work with various stakeholders, and expected effectiveness as an advocate for the institution and the State University System; and

ensuring that a background check of the president-elect is finalized prior to recommendation of the president-elect to the Board of Governors for confirmation;

2. holding on-campus meetings with faculty, students, and other stakeholders and conducting final interviews with the board of trustees;
3. selecting a final qualified candidate under the position criteria as president-elect for recommendation to the Board of Governors for confirmation;
4. drafting an employment contract covering the financial and key performance terms, to be reviewed by the Board of Governors general counsel prior to execution for compliance with state law, that is consistent with the compensation range approved by the board of trustees, that is contingent upon confirmation of the candidate by the Board of Governors; and includes an express bonus structure that is in alignment with key performance terms. It is recommended that the terms be consistent with the university's performance based funding metrics and accountability plan, but universities are not limited to these standards. If a university chooses alternative criteria, such criteria and an estimated timeframe for the determination of the criteria must be communicated to the Board of Governors; and
5. submitting a written description of the selection process and criteria, the president-elect's qualifications, and a copy of the employment contract to the Board of Governors for consideration in the confirmation process. The president-elect is not eligible to commence employment with the institution or execute the employment contract prior to confirmation by the Board of Governors.

(2) The Board of Governors' member who serves on the search committee shall be responsible for:

- (a) reporting on the progress of the search and selection process at each regularly scheduled meeting of the Board, and shall serve as a member of any search committee subcommittee established for the purpose of analyzing the appropriate range of compensation for the final candidate. As part of the member's report to the Board, the member will keep the Board informed on matters relating to the range of compensation and other material terms of any proposed employment contract discussed by the search committee or the board of trustees during the search process; and
- (b) informing the search committee at a scheduled meeting of the committee of concerns raised by members of the Board of Governors related to compensation or other material terms of proposed employment contracts.

(3) All persons with access to confidential applicant information protected by section 1004.098, Florida Statutes, shall execute a non-disclosure agreement to ensure confidentiality of the information as required by law. Failure to abide by the requirements of the non-disclosure agreement may subject an individual to civil or criminal penalties under Florida's Sunshine Laws.

(4) The Chancellor shall brief the president-elect in preparation for the meeting at which the president-elect shall be presented to the Board of Governors for confirmation.

(5) The president-elect shall personally appear before the Board of Governors at a scheduled meeting for an interview as part of the confirmation process. The Chair of the board of trustees, or designee, will describe the search process and the material terms of the proposed employment contract, and introduce the president-elect to the Board. The president-elect should be prepared to respond to questions related to the institution's mission under its strategic plan, general awareness of institutional and system metrics, and any priorities established by the Board of Governors for the institution.

(6) Amendments to this regulation are effective to active presidential searches and are applicable prospectively.

Authority: Section 7(d), art. IX, Fla. Const.; Fla. Stat. 1001.706, 1004.098; History: New 06-23-16, Amended 08-31-17, Amended 11-09-22, Amended 09-08-23, Amended 03-27-24, Amended 10-18-24.

Board of Trustees
Full Board Meeting
September 18, 2025**Presidential Search Committee Marketing Plan**

Recommended Action:

Informational

Background Information:

The Presidential Search Committee was tasked, in accordance with BOG Regulations 1.002, with approving a marketing plan, that will be submitted to the Board of Trustees. Funk Associates, one of the nation's premier firms dedicated to higher education search consulting, was retained to assist the committee. The Presidential Search Committee met on September 4, 2025, to review and approve the recommended marketing plan.

Implementation Plan:

The search consultants will use the marketing plan to place advertisements in the outlets listed in the plan.

Fiscal Implications:

This is included in the Funk Associates' contract.

Relevant Authority:

BOG Regulation 1.002 Presidential Search and Selection

Supports Strategic Direction(s):

Strategic Direction 2: Employee Success

Supporting Documents:

1. Marketing Plan
2. BOG Regulation 1.002 Presidential Search and Selection

Prepared by:

Candace Freeman, Presidential Search Committee Staff, Human Resources

Presenter:

Zack Smith, UWF Presidential Search Committee Chair

Marketing Plan

The short advertisement will be placed in the following online venues for 60 days each:

- *The Chronicle of Higher Education* - \$435.00*
- *Inside Higher Ed* - \$349.00*
- *Higheredjobs.com* - \$370.00*

*Estimates

1.002 Presidential Search and Selection

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Board of Trustees
Full Board Meeting
September 18, 2025**2025 UWF Bonus Report**

Recommended Action:

Report bonuses given at UWF for the 2024-2025 fiscal year.

Background Information:

Florida Board of Governors (BOG) adopted BOG Regulation 9.015, University Bonus Plan, on November 4, 2021. On March 18, 2022, the University of West Florida (UWF) Board of Trustees (BOT) approved HR-24.00-4/22, Bonuses, which was signed by President Saunders on April 12, 2022. This policy was revised and signed by Dr. Saunders on January 16, 2024.

HR-24.01-01/24, Bonuses, policy section II E, Reporting to the UWF BOT, states that each year at the Fall BOT meeting, the President shall submit a report to the BOT certifying that the bonuses paid in the prior fiscal year were in accordance with the UWF policy and within the University's budget.

Pursuant to section 1012.978, Florida Statutes and Board of Governors Regulation 9.015, this report is now required to be submitted to the Board of Governors on an annual basis. This year, the report must be submitted by September 30, 2025.

Implementation Plan:

None

Fiscal Implications:

The total cost of bonuses paid in FY23-24 was \$1,248,370.

Relevant Authority:

F.S. 1012.978; BOG Regulation 9.015, University Bonus Plan; HR-14.03-3/25, Compensation; and HR-24.01-01/24, Bonuses

Supports Strategic Direction(s):

Strategic Direction 2: Employee Success

Supporting Documents:

1. Interim President Diaz Certification Letter
2. 24-25 Bonus Expenditures Spreadsheet
3. F.S. 1012.978
4. HR-24.01-01/24, Bonuses
5. HR-14.03-3/25, Compensation

Prepared by:

Jamie C Sprague, Senior Associate Vice President Human Resources

Presenter:

Jamie C Sprague, Senior Associate Vice President Human Resources



August 21, 2025

University of West Florida
Board of Trustees
11000 University Parkway
Pensacola, FL 32514

University of West Florida Board of Trustees:

Pursuant to the Florida Board of Governors (BOG) regulation 9.015, University Bonus Plan, and the University of West Florida (UWF) policy, HR-24.00-4/22, Bonuses, UWF is to report all bonuses paid in the prior fiscal year.

The following is a report of the bonuses paid in fiscal year 2024-2025:

- A total of 361 bonuses were paid to employees.
- The total dollar amount equals \$1,248,370
- Type of Bonuses received:
 - Awards = 78
 - Additional Duties When Time Not Known = 4
 - Completion of a Special Project = 244
 - Superior Performance Evaluation = 35
- Type of Employees who received a bonus:
 - Executive Service = 10
 - Faculty 12 Month = 28
 - Faculty 3 Month = 24
 - Faculty 9/10 Month = 85
 - Adjuncts = 3
 - OPS = 1
 - Students = 4
 - University Work Force = 206

Please see the attached 24-25 Bonus Expenditure spreadsheet for additional details.

This equates to 22% of line employees who received a bonus and .0032% of the 2024-2025 UWF Operating Budget.

Delegation was given to the Senior Associate Vice President of Human Resources to oversee the day-to-day review and approval of personnel action forms and supporting documentation for all bonuses received in 2024-2025.

Through this letter, I certify that all bonuses were paid in accordance with the BOG regulation, the UWF policy, and the UWF budget.

Sincerely,

A handwritten signature in black ink, appearing to read 'M. Diaz, Jr.', with a stylized flourish at the end.

Manny Diaz, Jr
Interim President

UWF Bonuses for the 2024-2025 FY

FY	Employee Class	Title	Date	Amount	Bonus Type	Comments
2025	Faculty 12 Month	Chairperson	6/13/2025	\$1,066	Award	Award
2025	Faculty 12 Month	Associate Dean	6/13/2025	\$1,066	Award	Award
2025	Faculty 12 Month	Senior Research Associate	4/18/2025	\$500	Award	Award
2025	Faculty 12 Month	Chairperson	4/18/2025	\$2,000	Award	Award
2025	Faculty 3 Month	Associate Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Assistant Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Chairperson	6/13/2025	\$1,066	Award	Award
2025	Faculty 3 Month	Professor	6/13/2025	\$1,066	Award	Award
2025	Faculty 9/10 Month	Senior Instructor	12/13/2024	\$250	Award	Award
2025	Faculty 9/10 Month	Senior Instructor	11/27/2024	\$2,000	Award	Award
2025	Faculty 9/10 Month	Assistant Professor	1/24/2025	\$500	Award	Award
2025	Faculty 9/10 Month	Assistant Professor	12/13/2024	\$250	Award	Award
2025	Faculty 9/10 Month	Associate Professor	11/27/2024	\$1,500	Award	Award
2025	Faculty 9/10 Month	Senior Instructor	11/27/2024	\$2,000	Award	Award
2025	Faculty 9/10 Month	Lecturer	11/27/2024	\$2,000	Award	Award
2025	Faculty 9/10 Month	Associate Professor	11/27/2024	\$2,000	Award	Award
2025	Faculty 9/10 Month	Assistant Professor	11/27/2024	\$1,500	Award	Award
2025	Faculty 9/10 Month	Assist Prof of Prof/Clin Pract	12/13/2024	\$250	Award	Award
2025	Faculty 9/10 Month	Senior Lecturer	11/27/2024	\$2,000	Award	Award
2025	Faculty 9/10 Month	Associate Professor	11/27/2024	\$2,000	Award	Award
2025	OPS Hourly	Clerical and Secretarial	4/18/2025	\$500	Award	Award
2025	Student Hourly	Student Assistant	6/27/2025	\$500	Award	Award
2025	Student Salaried	Student Assistant	6/27/2025	\$1,000	Award	Award
2025	Student Salaried	Student Assistant	6/27/2025	\$500	Award	Award
2025	University Work Force Ex FT	Assistant Director	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Director	6/13/2025	\$1,066	Award	Award
2025	University Work Force Ex FT	Assistant Director	6/13/2025	\$1,066	Award	Award
2025	University Work Force Ex FT	Coordinator II	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Business Manager	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Associate Director	11/27/2024	\$1,000	Award	Award
2025	University Work Force Ex FT	Senior Coordinator	12/13/2024	\$250	Award	Award
2025	University Work Force Ex FT	Desktop Support Engineer	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Business Manager	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Full Stack Developer	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Coordinator I	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Associate Director	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Student Services Rep.	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Executive Specialist	4/18/2025	\$500	Award	Award
2025	University Work Force Ex FT	Associate Director	4/18/2025	\$5,000	Award	Award
2025	University Work Force Ex FT	Coordinator II	4/18/2025	\$1,000	Award	Award
2025	University Work Force Ex FT	Director	4/18/2025	\$2,000	Award	Award

2025	University Work Force Ex FT	Coordinator II	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Project Manager	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Assistant Director	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Senior Coordinator	11/27/2024	\$1,000	Award	Award
2025	University Work Force Ex FT	Human Resources Specialist	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Assistant Director	12/27/2024	\$625	Award	Award
2025	University Work Force Ex FT	Senior Coordinator	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Senior Coordinator	12/27/2024	\$156	Award	Award
2025	University Work Force Ex FT	Program Manager	12/27/2024	\$750	Award	Award
2025	University Work Force Ex FT	Director	12/27/2024	\$625	Award	Award
2025	University Work Force Ex FT	Program Manager	12/27/2024	\$125	Award	Award
2025	University Work Force Ex FT	Coordinator II	12/27/2024	\$125	Award	Award
2025	University Work Force Ex FT	Assistant Director	4/18/2025	\$2,000	Award	Award
2025	University Work Force Ex FT	Senior Coordinator	12/27/2024	\$125	Award	Award
2025	University Work Force Ex FT	Director	12/27/2024	\$958	Award	Award
2025	University Work Force Ex FT	Program Manager	12/27/2024	\$125	Award	Award
2025	University Work Force Ex FT	Associate Director	12/27/2024	\$781	Award	Award
2025	University Work Force Ex FT	Director	12/27/2024	\$333	Award	Award
2025	University Work Force Ex FT	Senior Coordinator	12/27/2024	\$156	Award	Award
2025	University Work Force Ex FT	Executive Director	12/27/2024	\$333	Award	Award
2025	University Work Force Ex FT	Associate Director	12/27/2024	\$125	Award	Award
2025	University Work Force Ex FT	Executive Director	12/27/2024	\$156	Award	Award
2025	University Work Force NE FT	Coordinator I	12/13/2024	\$350	Award	Award
2025	University Work Force NE FT	Office Administrator	4/18/2025	\$2,000	Award	Award
2025	University Work Force NE FT	Sr. Administrative Specialist	12/13/2024	\$350	Award	Award
2025	University Work Force NE FT	Administrative Specialist	6/13/2025	\$1,066	Award	Award
2025	University Work Force NE FT	Administrative Specialist	4/18/2025	\$2,000	Award	Award
2025	University Work Force NE FT	Law Enforcement Sergeant	4/18/2025	\$2,000	Award	Award
2025	University Work Force NE FT	Environmental Svcs. Technician	4/18/2025	\$2,000	Award	Award
2025	University Work Force NE FT	Maintenance Specialist	4/18/2025	\$2,000	Award	Award
2025	University Work Force NE FT	Accountant	4/18/2025	\$2,000	Award	Award
2025	University Work Force NE FT	Program Specialist	12/27/2024	\$125	Award	Award
2025	University Work Force NE FT	Photographer	12/27/2024	\$125	Award	Award
2025	Adjunct Faculty	Adjuncts	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Adjunct Faculty	Adjuncts	5/30/2025	\$500	Bonus	Completion of a Special Project
2025	Adjunct Faculty	Adjuncts	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Executive Service	Senior Associate Vice President	6/27/2025	\$5,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Director	9/6/2024	\$20,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Director	1/10/2025	\$1,500	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Dean	3/21/2025	\$33,550	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	4/18/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	4/18/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Senior Instructor	4/18/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Assistant Dean	4/18/2025	\$2,500	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Dean	3/21/2025	\$27,750	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	4/18/2025	\$2,000	Bonus	Completion of a Special Project

2025	Faculty 12 Month	Dean	3/21/2025	\$32,760	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Associate Librarian	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Asst. Vice Pres., Acad Affairs	7/26/2024	\$6,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Assist Prof of Prof/Clin Pract	6/13/2025	\$3,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Director	7/26/2024	\$12,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Director	3/7/2025	\$4,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	11/1/2024	\$5,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Instructor	6/13/2025	\$3,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	11/15/2024	\$225	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Assist Prof of Prof/Clin Pract	6/13/2025	\$3,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Director	6/13/2025	\$5,000	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Director	6/27/2025	\$250	Bonus	Completion of a Special Project
2025	Faculty 12 Month	Chairperson	4/18/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Lecturer	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Senior Lecturer	8/9/2024	\$5,200	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Lecturer	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Assistant Professor	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Senior Lecturer	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Senior Instructor	6/27/2025	\$250	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Instructor	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Associate Professor	5/30/2025	\$850	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Instructor	6/27/2025	\$250	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Assistant Professor	6/27/2025	\$250	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Senior Lecturer	6/13/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Assistant Chairperson	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Assoc Prof of Prof/Clin Pract	6/13/2025	\$3,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Assist Prof of Prof/Clin Pract	5/30/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Instructor	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 3 Month	Associate Professor	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assistant Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Senior Lecturer	5/16/2025	\$15,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assist Prof of Prof/Clin Pract	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Instructor	5/16/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Instructor	12/13/2024	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Senior Lecturer	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Instructor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Senior Instructor	5/16/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Senior Instructor	1/10/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Instructor	11/15/2024	\$225	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$3,000	Bonus	Completion of a Special Project

2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assist Prof of Prof/Clin Pract	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	10/18/2024	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Chairperson	11/1/2024	\$5,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Chairperson	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Chairperson	1/10/2025	\$3,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$5,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assoc Prof of Prof/Clin Pract	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Chairperson	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$1,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assist Prof of Prof/Clin Pract	11/27/2024	\$4,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	3/21/2025	\$1,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	10/4/2024	\$25,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Instructor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	1/10/2025	\$3,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/30/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$9,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assistant Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assoc Prof of Prof/Clin Pract	11/27/2024	\$4,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assoc Prof of Prof/Clin Pract	4/18/2025	\$2,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$3,510	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$990	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	6/4/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assistant Professor	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assistant Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assist Prof of Prof/Clin Pract	3/21/2025	\$1,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Chairperson	11/1/2024	\$5,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Lecturer	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	1/10/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assist Prof of Prof/Clin Pract	1/10/2025	\$2,500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Assistant Professor	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Professor	5/16/2025	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	7/12/2024	\$1,000	Bonus	Completion of a Special Project

2025	Faculty 9/10 Month	Director	1/10/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Director	9/9/2024	\$500	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Senior Lecturer	8/9/2024	\$5,200	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Instructor	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	1/10/2025	\$2,000	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$4,980	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Associate Professor	5/16/2025	\$1,020	Bonus	Completion of a Special Project
2025	Faculty 9/10 Month	Chairperson	11/1/2024	\$5,000	Bonus	Completion of a Special Project
2025	Student Hourly	Graduate Assistant	3/21/2025	\$1,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	11/19/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	10/4/2024	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	4/18/2025	\$2,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	10/18/2024	\$5,515	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Instruct. Designer/Developer	2/21/2025	\$3,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	12/13/2024	\$2,132	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	5/16/2025	\$2,132	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	8/23/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Academic Advisor	12/13/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	4/18/2025	\$7,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	11/15/2024	\$225	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Business Process Analyst	4/18/2025	\$2,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Vice President	6/30/2025	\$18,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	11/19/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	12/13/2024	\$2,750	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	11/15/2024	\$225	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	4/18/2025	\$18,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Program Manager	5/2/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	2/21/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Vice President	6/30/2025	\$12,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	10/18/2024	\$10,264	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	2/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Instruct. Designer/Developer	5/16/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Data Analyst	6/13/2025	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Academic Advisor	12/13/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	5/16/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	12/13/2024	\$2,132	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	5/16/2025	\$2,132	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	MIS Admin & Reporting Analyst	12/27/2024	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Program Manager	8/9/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	11/27/2024	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Business Manager	8/9/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	12/13/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	7/12/2024	\$2,000	Bonus	Completion of a Special Project

2025	University Work Force Ex FT	Full Stack Developer	12/27/2024	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	12/13/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Data Analyst	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Academic Advisor	12/13/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Enterprise Systems Engineer	12/27/2024	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	1/24/2025	\$750	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Senior Coordinator	11/27/2024	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Vice President	7/26/2024	\$18,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	8/23/2024	\$250	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	12/27/2024	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	7/12/2024	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Executive Director	7/26/2024	\$18,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	5/16/2025	\$2,132	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	12/13/2024	\$2,132	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	12/13/2024	\$2,750	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Desktop Support Engineer	5/16/2025	\$1,066	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Desktop Support Engineer	12/13/2024	\$1,066	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Academic Advisor	12/13/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	11/27/2024	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	5/16/2025	\$1,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Server System Administrator	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	8/23/2024	\$700	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	12/27/2024	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	6/30/2025	\$1,800	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	5/16/2025	\$2,300	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	3/21/2025	\$6,150	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	1/24/2025	\$1,200	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	11/15/2024	\$8,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	7/26/2024	\$1,800	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	9/6/2024	\$2,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Data Analyst	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	11/15/2024	\$225	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	4/18/2025	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	11/15/2024	\$225	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Academic Advisor	12/13/2024	\$1,750	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	1/10/2025	\$4,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	7/26/2024	\$12,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	12/13/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	9/6/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	MIS Admin & Reporting Analyst	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	7/12/2024	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Enterprise Systems Engineer	7/12/2024	\$1,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Full Stack Developer	7/12/2024	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	7/12/2024	\$3,000	Bonus	Completion of a Special Project

2025	University Work Force Ex FT	Director	6/30/2025	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Executive Assistant	6/30/2025	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Executive Director	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Senior Buyer	2/21/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Senior Buyer	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Director	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Senior Associate Vice President	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	3/7/2025	\$3,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Executive Director	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Vice President	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Business Manager	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Project Manager	3/7/2025	\$3,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	3/7/2025	\$3,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Sr. Engineering Tech./Designer	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator II	3/7/2025	\$3,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Project Manager	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Associate Controller	3/7/2025	\$1,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Coordinator I	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Project Manager	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Procurement Manager	3/7/2025	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Director	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	3/7/2025	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	6/27/2025	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	6/27/2025	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Assistant Director	12/13/2024	\$3,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Executive Director	4/18/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force Ex FT	Producer/Host	5/2/2025	\$250	Bonus	Completion of a Special Project
2025	University Work Force Ex PT	Director	10/18/2024	\$500	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Sr. Administrative Specialist	11/27/2024	\$4,000	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Office Administrator	12/13/2024	\$725	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Administrative Specialist	12/13/2024	\$725	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Administrative Specialist	8/9/2024	\$1,500	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Administrative Specialist	4/18/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Accountant	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Accountant	3/7/2025	\$2,000	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Law Enforcement Officer	1/24/2025	\$2,880	Bonus	Completion of a Special Project
2025	University Work Force NE FT	Administrative Specialist	5/2/2025	\$5,000	Bonus	Completion of a Special Project
2025	University Work Force NE PT	Coordinator I	4/18/2025	\$3,750	Bonus	Completion of a Special Project
						In Lieu of Salary Increae from Temporary Duties Duration Not Known at Onset
2025	University Work Force NE FT	Sr. Administrative Specialist	5/16/2025	\$3,000	Bonus	

2025	University Work Force Ex FT	Associate Director	5/16/2025	\$1,000	Bonus	In Lieu of Salary Increae from Temporary Duties Duration Not Known at Onset
2025	University Work Force Ex FT	Assistant Director	5/30/2025	\$1,000	Bonus	In Lieu of Salary Increae from Temporary Duties Duration Not Known at Onset
2025	University Work Force Ex FT	Business Manager	5/16/2025	\$3,000	Bonus	In Lieu of Salary Increae from Temporary Duties Duration Not Known at Onset
2025	Executive Service	Provost	9/20/2024	\$28,600	Bonus	Superior Performance
2025	Executive Service	President	9/20/2024	\$104,131	Bonus	Superior Performance
2025	Executive Service	Vice President	9/20/2024	\$36,125	Bonus	Superior Performance
2025	Executive Service	Vice President, Admin Services	9/20/2024	\$41,342	Bonus	Superior Performance
2025	Executive Service	Assistant Vice President	2/27/2025	\$15,000	Bonus	Superior Performance
2025	Executive Service	Associate Vice President	2/27/2025	\$15,000	Bonus	Superior Performance
2025	Executive Service	Senior Associate Vice President	2/27/2025	\$18,000	Bonus	Superior Performance
2025	Executive Service	General Counsel	9/20/2024	\$15,000	Bonus	Superior Performance
2025	Executive Service	Vice President	9/20/2024	\$36,452	Bonus	Superior Performance
2025	Faculty 12 Month	Director	10/4/2024	\$6,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Business Manager	4/18/2025	\$2,500	Bonus	Superior Performance
2025	University Work Force Ex FT	Program Manager	4/18/2025	\$2,500	Bonus	Superior Performance
2025	University Work Force Ex FT	Coordinator II	5/2/2025	\$2,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Student Program Support Spec.	4/18/2025	\$1,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Senior Coordinator	12/13/2024	\$3,554	Bonus	Superior Performance
2025	University Work Force Ex FT	Program Manager	12/13/2024	\$3,554	Bonus	Superior Performance
2025	University Work Force Ex FT	Coordinator II	4/18/2025	\$2,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Coordinator II	4/18/2025	\$2,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Coordinator I	4/18/2025	\$1,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Coordinator II	12/13/2024	\$3,554	Bonus	Superior Performance
2025	University Work Force Ex FT	Student Program Support Spec.	4/18/2025	\$1,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Associate Vice President	10/4/2024	\$12,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Director	10/4/2024	\$6,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Assistant Vice President	10/4/2024	\$10,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Head Athletic Coach	6/30/2025	\$3,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Coordinator II	5/2/2025	\$3,000	Bonus	Superior Performance
2025	University Work Force Ex FT	Director	9/20/2024	\$11,250	Bonus	Superior Performance
2025	University Work Force NE FT	Sr. Administrative Specialist	4/18/2025	\$2,000	Bonus	Superior Performance
2025	University Work Force NE FT	Office Specialist	12/13/2024	\$3,554	Bonus	Superior Performance
2025	University Work Force NE FT	Administrative Specialist	12/13/2024	\$3,554	Bonus	Superior Performance
2025	University Work Force NE FT	Office Administrator	4/18/2025	\$2,000	Bonus	Superior Performance
2025	University Work Force NE FT	Office Administrator	4/18/2025	\$2,000	Bonus	Superior Performance
2025	University Work Force NE FT	Sr. Administrative Specialist	4/18/2025	\$2,500	Bonus	Superior Performance
2025	University Work Force NE FT	Administrative Specialist	4/18/2025	\$1,000	Bonus	Superior Performance
2025	University Work Force NE FT	Coordinator I	9/20/2024	\$3,000	Bonus	Superior Performance

\$1,248,370

Select Year: 2024 ▼ Go

The 2024 Florida Statutes (including 2025 Special Session C)

[Title XLVIII](#)
EARLY LEARNING-20 EDUCATION CODE

[Chapter 1012](#)
PERSONNEL

[View Entire Chapter](#)

1012.978 Bonuses for state university system employees.—Notwithstanding s. [215.425](#)(3), a university board of trustees may implement a bonus scheme based on awards for work performance or employee recruitment and retention. The board of trustees must submit an annual report to the Board of Governors when awarding bonuses. The Board of Governors shall develop a regulation to ensure consistency in the implementation of this section.

History.—s. 5, ch. 2021-160; s. 5, ch. 2023-95.

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UNIVERSITY POLICY HR-24.01-01/24

TO: The University of West Florida Community

FROM: Dr. Martha D. Saunders, President

SUBJECT: Bonuses

RESPONSIBLE OFFICE: President and Human Resources

I. Purpose:

The University of West Florida (UWF or University) bonus plan is designed to comply with Sections 110.131(3), 215.425(3) and 1012.978, Florida Statutes, and the Florida Board of Governors Regulation 9.015. The University shall provide incentive bonuses based on work performance as well as addressing recruitment and retention needs. A bonus is a one-time monetary award given to an employee that is not added to the employee's base salary.

II. Policy:

A. Work Performance Bonuses

Evaluation Criteria: The evaluation criteria for these bonuses include, but are not limited to, documented work performance involving increased duties/responsibilities, successful completion of a special project, attainment of established goals, superior performance, or specific achievements or assignments of significance.

1. Performance-Based Bonus

The Performance-Based Bonus is to recognize an employee who has demonstrated continuous outstanding performance or who has made a significant contribution to the University's mission as well as departmental objectives. To be eligible to receive this bonus, the employee must have the highest rating on a current performance evaluation on file. The employee must not have had any disciplinary action in the past twelve months.

2. Project-Based Bonus

The Project-Based Bonus is to recognize an employee upon the successful completion of a special project with pre-determined goals or performance levels in addition to the employee's regularly assigned duties. The special project must have a specified start

date and an end date. The employee must not have had any disciplinary action in the past twelve months.

3. Additional Duties Bonus

The Additional Duties Bonus is to recognize an employee who has assumed additional duties. This would be in lieu of a temporary pay increase for the additional duties when the length of time was not known at the onset of the temporary duties.

4. Variable Compensation Plan Award

The Variable Compensation Plan (VCP) Award is a pre-approved plan that provides for a bonus based on successful attainment of established goals. A VCP establishes a method for recognizing the employee's contribution to departmental objectives, which typically include revenue generation and specific targets to be achieved with a pay-out schedule based on achieving the stated goals within the fiscal year. The VCP may also recognize an employee that implements a plan or a program that saves the University money. In both cases, a plan outlining the specific goals, a timeline for completion, and a review of goal attainment must be in writing and approved by the Division Head and the Associate Vice President of Human Resources prior to receiving the bonus. The employee must not have had any disciplinary action in the past twelve months.

5. Recognition Awards

Recognition Awards serve to recognize an employee for superior performance or specific achievements in designated categories. The University community gathers each year to honor and recognize employees for their outstanding achievements and years of service through the Service and Recognition Awards program. Select University Work Force and Other Personal Services employees are recognized with the Nautilus Excellence Award for significant achievements within the University, Department, or Community. Various faculty excellence awards are presented during the annual Honors Convocation ceremony.

B. Recruitment (Sign-On) Bonuses

Evaluation Criteria: The evaluation criteria for these bonuses include, but is not limited to, identification of external candidates with desirable specialized skills and exceptional experience, or where market conditions or departmental structure merit such an award.

C. Retention Bonuses

Evaluation Criteria: The evaluation criteria for these bonuses include, but is not limited to, circumstances to address verified offers of competing employment, address market conditions that are significantly higher than the current salary, ameliorate salary compression or inversion, or acknowledge successful completion of career development, training, or certification programs that are in the best interests of the University or support the mission of the University. There must be a current performance evaluation on file for

the employee to be eligible for this bonus. An employee may only receive one retention bonus in each category listed below. The employee must be in their current eligible position for at least one year prior to receiving bonus and must not have had any disciplinary action in the past twelve months.

1. One-Time Payment in Lieu of Salary Increase

A one-time payment in lieu of a salary increase may be made to an employee where the University's budget cannot reasonably support recurring salary increases but can support one-time payments using non-recurring funds. Such one-time payments enhance retention of the valuable employee and avoid the cost to the University of replacing an individual who may leave to seek an increase in salary elsewhere.

2. Educational Incentive Awards

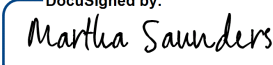
Educational Incentive Awards are given to encourage an employee to acquire a degree, a professional license, or a professional certification from an accredited institution or professional organization. The course of study should be relevant to the position and/or department needs. Educational Incentive Awards are not available for degrees, professional certifications, or licenses that are a current job requirement.

D. Delegations of Authority

The University of West Florida Board of Trustees (UWF BOT) delegates authority to the President or the President's designee to establish procedures to implement this bonus plan, including levels of approvals and compensation for specific bonuses described in this bonus plan. The University's bonus plan shall be overseen by the Associate Vice President of Human Resources for all out of unit faculty and out of unit University Work Force staff members.

E. Reporting to the UWF BOT

The Florida Board of Governors requires that bonuses paid pursuant to this plan be reported to the UWF BOT on a schedule to be set by the Board. Starting with the UWF BOT meeting of the Fall 2022 semester and each year thereafter, the President shall submit a report to the UWF BOT that certifies any bonuses paid during the prior fiscal year complied with the criteria in this bonus plan and that the bonuses were within the University's budget as approved by the UWF BOT. The total amount of funds paid for performance, recruitment, and retention bonuses shall be included in the report. Once the report has been approved by the UWF BOT, the Associate Vice President of Human Resources or the President's other designee will submit the report to the Board of Governors as required by BOG Reg. 9.015.

DocuSigned by:

 Approved by: _____
 Dr. Martha D. Saunders

Date: 01/16/2024 _____

Authority: §110.131, Florida Statutes
§215.425, Florida Statutes
§1012.978, Florida Statutes
Board of Governors Regulation 9.015
Relevant UWF Collective Bargaining Agreements

Cross Ref.: None

History: Approved April 2022; revised January 2024

Last Review: January 2024



UNIVERSITY POLICY HR-14.03-03/25

TO: The University of West Florida Community

FROM: Dr. Martha D. Saunders, President

SUBJECT: Compensation

RESPONSIBLE OFFICE: Human Resources

I. Purpose:

Pay issues shall be resolved in accordance with appropriate Florida Statutes, Board of Governors Regulations, University regulations, policies, and procedures, and relevant collective bargaining agreements. The University and Human Resources shall address pay issues in a fair and equitable manner.

II. Policy:

A. Pay Upon Original Appointment

1. Employees will be compensated relative to the market level for the job classification. Consideration may be given to substantial directly-related experience and comparable internal salaries, which may include factors such as job performance and level of responsibility.
2. Trainee and Provisional – University Work Force (UWF) Employees – These appointments are made in accordance with an approved training, hiring, and compensation plan developed by the appointing department and Human Resources.

B. Pay Increases

1. General Information
 - a. All pay increases are subject to the availability of funding.
 - b. A pay increase will not become effective until all documentation has been received and approved by Human Resources.
 - c. Employees must be in pay status in order to receive a pay increase of any kind.

- d. Employees paid from contracts and grants, auxiliaries, or local funds shall be eligible for pay increases provided such increases are permitted and funded by the funding entity.
 - e. Retroactive effective dates for pay actions are not permitted. An exception can be requested of the Associate Vice President of Human Resources. If an exception is approved, the effective date of the pay increase will not cross over calendar years.
 - f. Employees returning from an unpaid leave shall receive mandatory pay increases granted during the period of unpaid leave, unless pay implementation instructions provide otherwise. In addition, an employee returning from unpaid leave may be considered for discretionary and merit increases.
 - g. Pay increases are not automatic. A change in job responsibility or job classification may or may not result in an increase. Increases in pay will be made with appropriate administrative approval and consultation with Human Resources.
2. Categories of Pay Increases – University Work Force (UWF) Employees
- a. Position Orientation Year Increase – Upon successful completion of the initial orientation year, an employee may be eligible for a pay increase. The amount of the increase may vary depending on such factors as performance, internal equity, and budget appropriations. A Position Orientation Performance Evaluation must be completed and a rating of Above or higher must have been received before the orientation year increase is approved. A Position Orientation Year Increase may only be requested up to sixty days past the employee's one-year anniversary date.
 - b. Annual Pay Increase – The University may grant annual pay increases based on legislative action, Board of Trustees' Approval, or at the direction of the President.
 - c. Pay for Performance/Superior Performance Increase – Employees may be eligible to receive a pay increase based on performance if they meet both of the following criteria:
 - i. Employee must have a superior performance rating on the annual evaluation with supporting documentation of the specific ways the employee excelled in the accomplishment of assigned duties; and
 - ii. Employee may not have had any disciplinary actions (oral or written reprimand, or suspension) within the past five calendar years.
 - d. Permanent Duty/Job Change Increase – A pay increase may be given with proper administrative approval to an employee with a significant increase in the level or nature of assigned duties which are to continue on a permanent basis. Rationale for these increases includes changes in level of responsibility, skills, or knowledge within the current position and changes to classification.

- e. Temporary Duty Increase – A temporary pay increase may be given with proper administrative approval to an employee serving in an interim position. Increases should not be given for assigned interim periods of less than thirty days. An employee may also be given a temporary duty increase for taking on documented additional duties over a specified time period. Employees may not retain the temporary increase after the expiration of the temporary duty.
 - f. Internal Equity Increase – An equity increase is intended to mitigate an internal pay inequity. Factors generally considered include relevant experience, job performance, and level of responsibility. The Associate Vice President of Human Resources must be consulted prior to the approval of the internal equity increase.
 - g. Market Increase – A market increase is intended to mitigate a documented external pay inequity using industry recognized applicable market data. Market increase proposals must consider University internal equity. The Associate Vice President of Human Resources must be consulted prior to the approval of the market equity increase.
3. Faculty Pay Increases – Subject to the provisions of the UFF Collective Bargaining Agreement, legislative action, Board of Trustees' approval, or at the discretion of the President, as appropriate.

C. Supplemental Pay Occurrences

1. On-call/Call Back/Shift Differential

- a. On-Call pay – pay made available to employees for hours worked when they are called into work during a scheduled on-call period. If an employee is called back to the University to perform work outside the employee's normal scheduled working hours for the day, the time to and from work will be considered compensable work time.
- b. Call back pay – pay made available to employees who are required to return to work to perform duties outside of the normal working hours. If an employee is called back to perform work outside the employee's normal scheduled working for that day, or while the University is experiencing an emergency or unscheduled closing, the employee shall be credited with the actual time worked, including to and from the employee's home to the assigned work location, or two hours, whichever is greater.
- c. Shift differential pay – pay made available to employees who are required to work alternate shifts. Alternate shifts are determined by the department head in consultation with the Associate Vice President of Human Resources. Alternate shifts typically occur with Building Services, Facilities, and Utilities classifications.
 - i. Employees who work the second shift shall be paid a 5% differential per hour.

- ii. Employees who work the third shift shall be paid a 10% differential per hour.

2. Asbestos-Related and Lead Abatement Activities

- a. Small-Scale Infrequent and Significant/On-Going Asbestos-Related and Lead Abatement Activities
 - i. Asbestos-related and lead abatement duties must be included in the employee's current position description and the employee must have satisfactorily passed the required training.
 - ii. The employee shall receive an additional 15% per hour for only those hours actually spent in asbestos-related or lead abatement activities or a minimum of two hours, whichever is greater. If asbestos or lead activity is recognized in an employee's hiring rate, the employee is not entitled to additional supplemental pay.
 - iii. Any asbestos-related or lead abatement supplemental pay that occurs during the time that an employee is in overtime status shall be included in the regular rate of pay for overtime calculation.

D. Additional/Extra Compensation

- 1. Pay for appointments up to the available established full-time employee (FTE) for the position shall be from funds designated as Salaries.
- 2. Pay for the portion of an appointment in excess of the available established FTE for the position and for activities of limited duration where no FTE is assigned shall be from funds designated as OPS.
- 3. Non-exempt University Work Force (UWF) employees who perform additional work outside of their current classification may be eligible for additional/extra compensation. Compensation for these additional services, which are not an extension of their current job description and therefore not eligible for overtime, should take into consideration the complexity of the additional assignment and the employee's qualifications.
- 4. Appropriate compensation for qualified employees to teach credit and non-credit courses/workshops and preparation related to such courses/workshops shall be determined by the appropriate Dean and the Provost.

E. Presidential Designated Pay

- 1. Cost of Living Adjustment (recurring) – the President may elect to give a recurring cost of living adjustment.

2. Cost of Living Adjustment (non-recurring) – the President may elect to give a non-recurring cost of living adjustment.
3. Eligibility requirements for either the recurring or non-recurring cost of living adjustment will be outlined in a communication from the President.

F. Miscellaneous

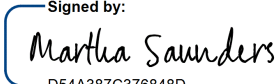
1. Moving Expenses – Moving expenses may be provided as part of a recruitment package with approval by the Division Head.
2. Health or Safety Equipment – When the University requires an employee to use or wear health or safety equipment, such equipment shall be provided by the University at no cost to the employee.

G. Compensation Maximums

1. The University President may not receive more than \$200,000 in remuneration from public funds. The University may, itself or through a component unit, provide cash or cash-equivalent compensation from funds that are not public funds in excess of the \$200,000 limit.
 - a. Remuneration includes salary, bonuses, and cash-equivalent compensation paid to the President by the University for work performed, excluding health insurance and retirement benefits.
 - b. Public funds are defined as funds appropriated from general revenue, state trust funds, including the student and other fees trust funds, educational enhancement trust fund, phosphate research trust fund, or any funds from a state university trust fund regardless of repository.
 - c. Cash-equivalent compensation means any benefit that may be assigned an equivalent cash value.
2. A University employee may not receive more than \$250,000 in remunerations from public funds. The University may, itself or through a component unit, provide cash-equivalent compensation from funds that are not public funds to a University employee in excess of the \$250,000 limit.
 - a. Remuneration includes salary, bonuses, and cash-equivalent compensation paid to an employee by the University for work performed, excluding health insurance and retirement benefits.
 - b. Public funds are defined as funds appropriated from general revenue, state trust funds, including the student and other fees trust funds, educational enhancement

trust fund, phosphate research trust fund, or any funds from a state university trust fund regardless of repository.

- c. Cash-equivalent compensation means any benefit that may be assigned an equivalent cash value.
- 3. University teaching faculty in instructional programs as listed in Florida Board of Governors Regulation 9.006, University Personnel Definitions and Compensation, are excluded from the \$250,000 limit.

Approved by:  **Date:** 03/31/2025
Dr. Martha D. Saunders

Authority: Section 1001.74, Florida Statutes
Sections 1012.975 and 1012.976, Florida Statutes
Relevant Collective Bargaining Agreements

Cross Ref.: University Policy HR-24, Bonuses
BOG Reg. 9.006, University Personnel Definitions and Compensation

History: Created July 2004; amended March 2023, September 2023, and March 2025

Last Review: March 2025

Board of Trustees
Board Meeting
September 18, 2025

FY 2024-2025 Final Operating Budget Summary Performance

Recommended Action:

The FY 2024-2025 Final Operating Budget Summary Performance is provided for the Trustees information and discussion only; no action is required.

Background Information:

Florida Board of Governors (BOG) Regulation 9.007, State University Operating Budgets and Requests, provide guidelines for each university to present and obtain approval for their annual operating budgets. In compliance with this regulation, the University of West Florida Board of Trustees approved and authorized the FY2024/25 Estimated Operating Budget Summary at its June 20, 2024, full board meeting.

As required by the regulation, this presentation provides a report at the end of the fiscal year with budget-to-actual results for each fund group. This ensures fiscal accountability, transparency, and alignment of university operations with the BOG Strategic Plan priorities.

Implementation Plan:

The University will present a comprehensive FY2024/25 Operating Budget Summary Performance report to the Board of Trustees. This report includes:

- A comparison of budgeted versus actual revenues and expenditures across all fund groups.
- Identification and explanation of major variances.
- Analysis of overall financial performance and institutional resource management.
- Assessment of fiscal implications for the University's ongoing operations and planning.

Fiscal Implications:

An actual \$392.8 million revenue budget from all fund sources, or \$185.5 million in Education & General. A total expense actual performance of \$380.2 million spent, or \$161.5 million spent for Education and General.

The FY2024-2025 final budget summary reflects the University's overall financial position, including state appropriations, tuition and fees, auxiliary operations, research activity, and other sources. It demonstrates UWF's commitment to strong fiscal stewardship, sustainability of operations, and alignment of resource use with institutional and systemwide priorities.

Relevant Authority:

Florida Board of Governors Regulations 9.007, State University Operating Budgets and Requests

Supports Strategic Direction(s):

This information item supports all seven Strategic Directions.

Supporting Documents:

1. PowerPoint of Highlights (2 pages)
2. FY 2024-2025 Operating Budget Summary, Final Year End (18 Pages)
3. Florida Board of Governors Regulation 9.007, State University Operating Budgets and Requests

Prepared by:

- Jeffrey Djerlek, Senior Associate Vice President for Finance and University Controller
- Sharon Jordan, Associate Controller of Reporting
- Tony Templeton, Assistant Controller
- Sarah Bloxson, Coordinator

Presenter:

Jeffrey Djerlek, Senior Associate Vice President for Finance and University Controller

Education & General

- Total Revenues were up **\$4.9M or 3% over** 3-yr estimated budget.
 - Enrollment growth at **6%** reflected in SFTF increase of \$4.9M.
- Total Expenditures were **in line with** 3-yr estimated budget
 - **\$6.1M** Salary & Benefits- increase for Faculty Recruitment & Retention and investment of Performance-Based Funding
 - **(\$5.4M)** Expenses - new appropriations held in Central until reinvested per the Strategic Plan. The investments are shown in the FY25 estimated budget.

Carryforward

- **\$12.6M** =7% statutory carryforward cash reserve requirement.
- Expenses were **(\$8.9M) lower** than 3-year estimate for the current year, offset by increases in OCO and FCO spending.
- FCO was **\$1.9M higher** than 3-year estimate for the current year, as dollars continue to be invested in deferred maintenance and capital projects.
- All items agree with BOT-approved carryforward spending plans.

Auxiliaries

- Total actual revenues are under the estimated average by **(\$1.9M)**:
 - **(\$5.5M)** decrease in Fees related to overestimating certificate program growth.
 - **\$0.5M** increases in Misc. Receipts due to enrollment growth.
 - **\$2.3M** increase in Other Grants and Donations related to the UWF Sandy Sansing Sports Medicine Center and Foundation gift.
 - **\$0.7M** increase in other revenue related to investment returns.
 - **\$0.6M** increase in expense budget primarily due to Southside Dormitory Demolition project and increase in direct education through Auxiliaries.
 - **\$1.1M** increase in FCO estimate due to Sandy Sansing Sports Medicine Center spending.
-

University of West Florida
Consolidated BOT Approved Operating Budget Summary
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	Education & General	Carry Forward	Auxiliaries	Athletics	Student Activity	Contracts & Grants	Financial Aid	Concessions	Technology	Board Approved Fees (Green Fee)	Total All Funds
Beginning Balance	\$0	\$59,896,798	\$56,065,363	\$16,171	\$1,858,892	\$7,189,876	\$4,575,999	\$427,594	\$3,644,012	\$310,495	\$133,985,200
Revenues & Transfers In:											
1. State Appropriated Funds	\$115,052,835	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$115,052,835
2. Enhancement Trust Fund (Lottery)	\$19,193,632	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$19,193,632
3. Student Fee Trust Fund (Tuition)	\$45,143,775	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$45,143,775
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$0	\$0	\$1,807,000	\$280,000	\$0	\$0	\$0	\$0	\$0	\$0	\$2,087,000
7. Fees	\$0	\$0	\$38,251,100	\$5,500,000	\$3,639,100	\$19,500	\$1,970,000	\$0	\$1,388,600	\$187,000	\$50,955,300
8. Miscellaneous Receipts	\$0	\$0	\$5,344,700	\$949,000	\$0	\$1,233,400	\$43,281,900	\$236,840	\$0	\$0	\$51,045,840
9. Other Grants & Donations	\$0	\$0	\$80,000	\$0	\$0	\$6,956,700	\$0	\$0	\$0	\$0	\$7,036,700
10. Rent	\$0	\$0	\$393,800	\$8,000	\$0	\$0	\$0	\$0	\$0	\$0	\$401,800
11. U.S. Grants	\$0	\$0	\$0	\$0	\$0	\$20,476,000	\$54,383,800	\$0	\$0	\$0	\$74,859,800
12. City, County & State Grants	\$0	\$0	\$0	\$0	\$0	\$2,899,100	\$0	\$0	\$0	\$0	\$2,899,100
13. Other Revenue	\$0	\$0	\$2,689,600	\$0	\$0	\$237,700	\$247,300	\$0	\$90,900	\$9,000	\$3,274,500
14. Total Additions to Fund Balance	\$179,390,242	\$0	\$48,566,200	\$6,737,000	\$3,639,100	\$31,822,400	\$99,883,000	\$236,840	\$1,479,500	\$196,000	\$371,950,282
15. Total Resources Available	\$179,390,242	\$59,896,798	\$104,631,563	\$6,753,171	\$5,497,992	\$39,012,276	\$104,458,999	\$664,434	\$5,123,512	\$506,495	\$505,935,482
Expenditures & Transfers Out:											
16. Salaries & Benefits	\$114,219,400	\$1,008,400	\$14,001,500	\$3,288,900	\$1,937,100	\$9,621,000	\$0	\$0	\$165,000	\$0	\$144,241,300
17. Other Personal Services (OPS)	\$10,180,600	\$1,231,400	\$5,157,100	\$500,600	\$1,175,200	\$1,817,700	\$0	\$0	\$0	\$0	\$20,062,600
18. Expenses	\$51,640,280	\$42,368,848	\$19,919,800	\$3,358,900	\$629,800	\$18,879,000	\$99,499,000	\$124,840	\$290,700	\$69,900	\$236,781,068
19. Other Capital Outlay (OCO)	\$846,700	\$1,229,700	\$226,400	\$0	\$0	\$1,615,600	\$0	\$0	\$516,700	\$5,800	\$4,440,900
20. Library Resources	\$1,164,500	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,164,500
21. Risk Management	\$592,462	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$592,462
22. Financial Aid	\$746,300	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$746,300
23. Debt Service	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
25. Transfers	\$0	\$0	\$2,592,400	(\$411,400)	\$247,100	\$292,500	(\$2,832,600)	\$112,000	\$0	\$0	\$0
26. Fixed Capital Outlay (FCO)	\$0	\$1,124,400	\$4,934,000	\$0	\$0	\$1,284,900	\$0	\$0	\$0	\$117,000	\$7,460,300
27. Total Resources Used	\$179,390,242	\$46,962,748	\$46,831,200	\$6,737,000	\$3,989,200	\$33,510,700	\$96,666,400	\$236,840	\$972,400	\$192,700	\$415,489,430
Net Change	\$0	(\$46,962,748)	\$1,735,000	\$0	(\$350,100)	(\$1,688,300)	\$3,216,600	\$0	\$507,100	\$3,300	(\$43,539,148)
Statutory Carryforward Cash Reserve	\$0	(\$12,934,050)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$12,934,050)
Ending Balance	\$0	\$0	\$57,800,363	\$16,171	\$1,508,792	\$5,501,576	\$7,792,599	\$427,594	\$4,151,112	\$313,795	\$77,512,002

University of West Florida
Consolidated Current Modified Operating Budget Summary
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	Education & General	Carry Forward	Auxiliaries	Athletics	Student Activity	Contracts & Grants	Financial Aid	Concessions	Technology	Board Approved Fees (Green Fee)	Total All Funds
Beginning Balance	\$0	\$54,324,323	\$57,136,250	\$267,390	\$2,052,029	\$8,195,535	\$3,952,791	\$416,307	\$3,105,431	\$346,547	\$129,796,603
Revenues & Transfers In:											
1. State Appropriated Funds	\$116,219,428	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$116,219,428
2. Enhancement Trust Fund (Lottery)	\$19,193,632	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$19,193,632
3. Student Fee Trust Fund (Tuition)	\$50,142,532	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$50,142,532
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$0	\$0	\$1,807,000	\$280,000	\$0	\$0	\$0	\$0	\$0	\$0	\$2,087,000
7. Fees	\$0	\$0	\$38,251,100	\$5,500,000	\$3,639,100	\$19,500	\$1,970,000	\$0	\$1,388,600	\$187,000	\$50,955,300
8. Miscellaneous Receipts	\$0	\$0	\$5,344,700	\$949,000	\$0	\$1,233,400	\$43,281,900	\$236,840	\$0	\$0	\$51,045,840
9. Other Grants & Donations	\$0	\$0	\$80,000	\$0	\$0	\$6,956,700	\$0	\$0	\$0	\$0	\$7,036,700
10. Rent	\$0	\$0	\$393,800	\$8,000	\$0	\$0	\$0	\$0	\$0	\$0	\$401,800
11. U.S. Grants	\$0	\$0	\$0	\$0	\$0	\$20,476,000	\$54,383,800	\$0	\$0	\$0	\$74,859,800
12. City, County & State Grants	\$0	\$0	\$0	\$0	\$0	\$2,899,100	\$0	\$0	\$0	\$0	\$2,899,100
13. Other Revenue	\$0	\$0	\$2,689,600	\$0	\$0	\$237,700	\$247,300	\$0	\$90,900	\$9,000	\$3,274,500
14. Total Additions to Fund Balance	\$185,555,592	\$0	\$48,566,200	\$6,737,000	\$3,639,100	\$31,822,400	\$99,883,000	\$236,840	\$1,479,500	\$196,000	\$378,115,632
15. Total Resources Available	\$185,555,592	\$54,324,323	\$105,702,450	\$7,004,390	\$5,691,129	\$40,017,935	\$103,835,791	\$653,147	\$4,584,931	\$542,547	\$507,912,235
Expenditures & Transfers Out:											
16. Salaries & Benefits	\$120,582,137	\$1,494,056	\$16,636,127	\$2,934,836	\$1,968,276	\$10,598,522	\$0	\$0	\$165,000	\$0	\$154,378,954
17. Other Personal Services (OPS)	\$10,444,747	\$584,918	\$6,657,876	\$517,111	\$1,124,148	\$1,664,350	\$0	\$0	\$11,500	\$0	\$21,004,650
18. Expenses	\$50,082,228	\$29,176,801	\$27,659,195	\$4,527,718	\$1,333,420	\$30,213,812	\$99,527,400	\$144,364	\$1,032,914	\$125,834	\$243,823,686
19. Other Capital Outlay (OCO)	\$1,633,883	\$2,786,293	\$535,522	\$111,599	\$23,515	\$1,973,261	\$0	\$0	\$1,209,821	\$14,045	\$8,287,939
20. Library Resources	\$1,427,597	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,427,597
21. Risk Management	\$634,874	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$634,874
22. Financial Aid	\$750,126	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$750,126
23. Debt Service	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
25. Transfers	\$0	\$0	\$2,592,400	(\$206,561)	\$440,000	(\$200,000)	(\$1,222,676)	\$112,000	\$0	\$10,000	\$1,525,163
26. Fixed Capital Outlay (FCO)	\$0	\$7,721,969	\$7,631,377	\$245,838	\$0	\$1,409,509	\$0	\$0	\$10,000	\$107,173	\$17,125,866
27. Total Resources Used	\$185,555,592	\$41,764,037	\$61,712,497	\$8,130,541	\$4,889,359	\$45,659,454	\$98,304,724	\$256,364	\$2,429,235	\$257,052	\$448,958,855
Net Change	\$0	(\$41,764,037)	(\$13,146,297)	(\$1,393,541)	(\$1,250,259)	(\$13,837,054)	\$1,578,276	(\$19,524)	(\$949,735)	(\$61,052)	(\$70,843,223)
Statutory Carryforward Cash Reserve	\$0	(\$12,560,286)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$12,560,286)
Ending Balance	\$0	\$0	\$43,989,953	(\$1,126,151)	\$801,770	(\$5,641,519)	\$5,531,067	\$396,783	\$2,155,696	\$285,495	\$46,393,094

University of West Florida
Consolidated Operating Actual Summary
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	Education & General	Carry Forward	Auxiliaries	Athletics	Student Activity	Contracts & Grants	Financial Aid	Concessions	Technology	Board Approved Fees (Green Fee)	Total All Funds
Beginning Balance	\$0	\$54,324,323	\$57,136,250	\$267,390	\$2,052,029	\$8,195,535	\$3,952,791	\$416,307	\$3,105,431	\$346,547	\$129,796,603
Revenues & Transfers In:											
1. State Appropriated Funds	\$116,219,428	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$116,219,428
2. Enhancement Trust Fund (Lottery)	\$19,193,632	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$19,193,632
3. Student Fee Trust Fund (Tuition)	\$47,816,841	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$47,816,841
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$0	\$0	\$1,815,125	\$269,821	\$0	\$117,940	\$0	\$0	\$0	\$0	\$2,202,886
7. Fees	\$0	\$0	\$38,619,452	\$5,514,445	\$3,591,633	\$247,755	\$1,163,128	\$0	\$1,541,618	\$198,717	\$50,876,748
8. Miscellaneous Receipts	\$0	\$0	\$4,905,642	\$1,532,059	\$507	\$1,858,910	\$49,315,673	\$217,218	\$0	\$0	\$57,830,009
9. Other Grants & Donations	\$0	\$0	\$2,741,883	\$0	\$0	\$7,080,037	\$0	\$0	\$0	\$0	\$9,821,920
10. Rent	\$0	\$0	\$405,167	\$12,078	\$0	\$0	\$0	\$0	\$0	\$0	\$417,245
11. U.S. Grants	\$0	\$0	\$0	\$0	\$0	\$18,526,754	\$54,697,002	\$0	\$0	\$0	\$73,223,756
12. City, County & State Grants	\$0	\$0	\$0	\$445	\$0	\$6,883,625	\$0	\$0	\$104,908	\$12,040	\$7,001,018
13. Other Revenue	\$2,325,692	\$0	\$5,290,955	\$0	\$0	\$316,655	\$305,976	\$0	\$0	\$0	\$8,239,278
14. Total Additions to Fund Balance	\$185,555,593	\$0	\$53,778,224	\$7,328,848	\$3,592,140	\$35,031,676	\$105,481,779	\$217,218	\$1,646,526	\$210,757	\$392,842,761
15. Total Resources Available	\$185,555,593	\$54,324,323	\$110,914,474	\$7,596,238	\$5,644,169	\$43,227,211	\$109,434,570	\$633,525	\$4,751,957	\$557,304	\$522,639,364
Expenditures & Transfers Out:											
16. Salaries & Benefits	\$118,869,496	\$1,242,320	\$14,912,736	\$2,934,648	\$1,856,882	\$10,597,729	\$0	\$0	\$217,449	\$0	\$150,631,260
17. Other Personal Services (OPS)	\$9,367,095	\$795,815	\$5,681,599	\$514,935	\$999,595	\$1,653,650	\$0	\$0	\$0	\$0	\$19,012,689
18. Expenses	\$29,565,401	\$10,814,739	\$20,164,781	\$4,462,367	\$778,917	\$21,091,361	\$106,622,618	\$122,716	\$798,550	\$58,526	\$194,479,976
19. Other Capital Outlay (OCO)	\$909,739	\$1,216,794	\$122,557	\$122,684	\$23,515	\$1,576,731	\$0	\$0	\$863,777	\$13,995	\$4,849,792
20. Library Resources	\$1,427,597	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$1,427,597
21. Risk Management	\$634,874	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$634,874
22. Financial Aid	\$746,300	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$746,300
23. Debt Service	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
25. Transfers	\$0	\$0	\$1,162,900	(\$772,219)	\$435,645	(\$193,705)	(\$735,330)	\$100,000	\$2,392	\$317	\$0
26. Fixed Capital Outlay (FCO)	\$0	\$3,839,443	\$3,230,489	\$237,763	\$0	\$1,013,700	\$0	\$0	\$0	\$107,173	\$8,428,568
27. Total Resources Used	\$161,520,502	\$17,909,111	\$45,275,062	\$7,500,178	\$4,094,554	\$35,739,466	\$105,887,288	\$222,716	\$1,882,168	\$180,011	\$380,211,056
Net Change	\$24,035,091	(\$17,909,111)	\$8,503,162	(\$171,330)	(\$502,414)	(\$707,790)	(\$405,509)	(\$5,498)	(\$235,642)	\$30,746	\$12,631,705
Statutory Carryforward Cash Reserve	\$0	(\$12,560,286)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	(\$12,560,286)
Ending Balance	\$24,035,091	\$23,854,926	\$65,639,412	\$96,060	\$1,549,615	\$7,487,745	\$3,547,282	\$410,809	\$2,869,789	\$377,293	\$129,868,022

University of West Florida
Education & General
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	BOT Approved FY2024-2025 Budget	Prior Quarter Modified Budget as of 03-31- 2025	Current Modified Budget as of 06-30-2025	Change	Notes & Comments
Beginning Balance	\$0	\$0	\$0	\$0	
Revenues & Transfers In:					
1. State Appropriated Funds	\$115,052,835	\$115,882,718	\$116,219,428	\$336,710	1 BT State Funded POSE Wvrs
2. Enhancement Trust Fund (Lottery)	\$19,193,632	\$19,193,632	\$19,193,632	\$0	
3. Student Fee Trust Fund (Tuition)	\$45,143,775	\$45,143,775	\$50,142,532	\$4,998,757	Incr due to Enrollment Growth
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$0	\$0	\$0	\$0	
7. Fees	\$0	\$0	\$0	\$0	
8. Miscellaneous Receipts	\$0	\$0	\$0	\$0	
9. Other Grants & Donations	\$0	\$0	\$0	\$0	
10. Rent	\$0	\$0	\$0	\$0	
11. U.S. Grants	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$179,390,242	\$180,220,125	\$185,555,592	\$5,335,467	
15. Total Resources Available	\$179,390,242	\$180,220,125	\$185,555,592	\$5,335,467	
Expenditures & Transfers Out:					
16. Salaries & Benefits	\$114,219,400	\$118,422,745	\$120,582,137	\$2,159,392	104 BTs \$2.1M Nonrecur Wage Act from Exp
17. Other Personal Services (OPS)	\$10,180,600	\$10,173,961	\$10,444,747	\$270,786	249 BTs Not Material
18. Expenses	\$51,640,280	\$47,356,649	\$50,082,228	\$2,725,579	124 BTs \$5.0M SFTF Gains, Offset (\$2.1M) Nonrecur Wage Act
19. Other Capital Outlay (OCO)	\$846,700	\$1,491,448	\$1,633,883	\$142,435	15 BTs Not Material
20. Library Resources	\$1,164,500	\$1,394,148	\$1,427,597	\$33,449	3 BTs Not Material
21. Risk Management	\$592,462	\$634,874	\$634,874	\$0	
22. Financial Aid	\$746,300	\$746,300	\$750,126	\$3,826	1 BT Not Material
23. Debt Service	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	
25. Transfers	\$0	\$0	\$0	\$0	
26. Fixed Capital Outlay (FCO)	\$0	\$0	\$0	\$0	
27. Total Resources Used	\$179,390,242	\$180,220,125	\$185,555,592	\$5,335,467	
Net Change	\$0	\$0	\$0	\$10,670,934	
Ending Balance	\$0	\$0	\$0	\$10,670,934	

University of West Florida
Education & General
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	BOT Approved FY2024-2025 Budget	Current Modified Budget as of 06-30-2025	3 Yr Historical Avg % of Budget	Y-T-D Estimated Budget Based On a 3 Year Average	Actuals as of 06-30-2025	Over /(Under) Estimated Budget	Encumbrances as of 06-30-2025	Notes & Comments
Beginning Balance	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
Revenues & Transfers In:								
1. State Appropriated Funds	\$115,052,835	\$116,219,428	100.00%	\$116,219,428	\$116,219,428	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$19,193,632	\$19,193,632	100.00%	\$19,193,632	\$19,193,632	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$45,143,775	\$50,142,532	99.32%	\$49,800,922	\$47,816,841	(\$1,984,081)	\$0	SFTF Gain and Investment Income recorded as Other Rev
4. Federal Grants Trust Fund (Education)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
7. Fees	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
8. Miscellaneous Receipts	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
9. Other Grants & Donations	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
10. Rent	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
11. U.S. Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	0.00%	\$0	\$2,325,692	\$2,325,692	\$0	SFTF Gain & Investment Income (1st \$375,000 is recorded in SFTF)
14. Total Additions to Fund Balance	\$179,390,242	\$185,555,592		\$185,213,982	\$185,555,593	\$341,611	\$0	
15. Total Resources Available	\$179,390,242	\$185,555,592		\$185,213,982	\$185,555,593	\$341,611	\$0	
Expenditures & Transfers Out:								
16. Salaries & Benefits	\$114,219,400	\$120,582,137	93.55%	\$112,800,225	\$118,869,496	\$6,069,271	\$0	Incr in Actual Expenditures due to Perf Based Funding
17. Other Personal Services (OPS)	\$10,180,600	\$10,444,747	104.06%	\$10,869,057	\$9,367,095	(\$1,501,962)	\$0	Act Lower than Est Bud 3 Yr Avg due to Savings
18. Expenses	\$51,640,280	\$50,082,228	69.88%	\$34,997,357	\$29,565,401	(\$5,431,956)	\$1,478,202	Incr in CY Appropriatons Held Central until Admin Re-invest by Strategic Plan
19. Other Capital Outlay (OCO)	\$846,700	\$1,633,883	41.83%	\$683,511	\$909,739	\$226,228	\$616,269	
20. Library Resources	\$1,164,500	\$1,427,597	57.84%	\$825,748	\$1,427,597	\$601,849	\$0	Library Res are in line with BOT approved budget
21. Risk Management	\$592,462	\$634,874	100.00%	\$634,874	\$634,874	\$0	\$0	
22. Financial Aid	\$746,300	\$750,126	97.48%	\$731,238	\$746,300	\$15,062	\$0	
23. Debt Service	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
25. Transfers	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
26. Fixed Capital Outlay (FCO)	\$0	\$0	27.40%	\$0	\$0	\$0	\$0	
27. Total Resources Used	\$179,390,242	\$185,555,592		\$161,542,010	\$161,520,502	(\$21,508)	\$2,094,471	
Net Change	\$0	\$0		\$23,671,972	\$24,035,091			
Ending Balance	\$0	\$0		\$23,671,972	\$24,035,091			

University of West Florida
Education & General
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	Actuals as of 06-30-2022	Actuals as of 06-30-2023	Actuals as of 06-30-2024	Actuals as of 06-30-2025
Beginning Balance	\$0	\$0	\$0	\$0
Revenues & Transfers In:				
1. State Appropriated Funds	\$73,177,364	\$81,068,007	\$115,102,970	\$116,219,428
2. Enhancement Trust Fund (Lottery)	\$14,313,794	\$17,781,190	\$20,368,966	\$19,193,632
3. Student Fee Trust Fund (Tuition)	\$42,752,002	\$42,972,814	\$46,494,865	\$47,816,841
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$0	\$0	\$0	\$0
7. Fees	\$0	\$0	\$0	\$0
8. Miscellaneous Receipts	\$0	\$0	\$0	\$0
9. Other Grants & Donations	\$0	\$0	\$0	\$0
10. Rent	\$0	\$0	\$0	\$0
11. U.S. Grants	\$0	\$0	\$0	\$0
12. City, County & State Grants	\$0	\$0	\$0	\$0
13. Other Revenue	\$0	\$0	\$970,104	\$2,325,692
14. Total Additions to Fund Balance	\$130,243,160	\$141,822,011	\$182,936,905	\$185,555,593
15. Total Resources Available	\$130,243,160	\$141,822,011	\$182,936,905	\$185,555,593
Expenditures & Transfers Out:				
16. Salaries & Benefits	\$87,450,557	\$92,336,963	\$105,265,407	\$118,869,496
17. Other Personal Services (OPS)	\$7,961,884	\$9,006,283	\$10,061,064	\$9,367,095
18. Expenses	\$23,151,145	\$24,600,096	\$31,168,676	\$29,565,401
19. Other Capital Outlay (OCO)	\$230,280	\$171,146	\$621,831	\$909,739
20. Library Resources	\$48,698	\$55,544	\$0	\$1,427,597
21. Risk Management	\$405,511	\$469,305	\$592,462	\$634,874
22. Financial Aid	\$719,949	\$719,949	\$746,300	\$746,300
23. Debt Service	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0
25. Transfers	\$0	\$0	\$0	\$0
26. Fixed Capital Outlay (FCO)	\$0	\$369,937	\$0	\$0
27. Total Resources Used	\$119,968,024	\$127,729,223	\$148,455,740	\$161,520,502
Net Change	\$10,275,136	\$14,092,788	\$34,481,165	\$24,035,091
Ending Balance	\$10,275,136	\$14,092,788	\$34,481,165	\$24,035,091

University of West Florida
Carry Forward
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	BOT Approved FY2024-2025 Budget	Prior Quarter Modified Budget as of 03-31- 2025	Current Modified Budget as of 06-30-2025	Change	Notes & Comments
Beginning Balance	\$59,896,798	\$54,324,323	\$54,324,323	\$0	
Revenues & Transfers In:					
1. State Appropriated Funds	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$0	\$0	\$0	\$0	
7. Fees	\$0	\$0	\$0	\$0	
8. Miscellaneous Receipts	\$0	\$0	\$0	\$0	
9. Other Grants & Donations	\$0	\$0	\$0	\$0	
10. Rent	\$0	\$0	\$0	\$0	
11. U.S. Grants	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$0	\$0	\$0	\$0	
15. Total Resources Available	\$59,896,798	\$54,324,323	\$54,324,323	\$0	
Expenditures & Transfers Out:					
16. Salaries & Benefits	\$1,008,400	\$1,446,938	\$1,494,056	\$47,118	10 BTs Not Material
17. Other Personal Services (OPS)	\$1,231,400	\$559,945	\$584,918	\$24,973	2 BTs Not Material
18. Expenses	\$42,368,848	\$30,219,371	\$29,176,801	(\$1,042,570)	86 BTs \$696.3K Visitor Cntr Redesign, \$306.6K 300k Gal Water Tower Moved to FCO
19. Other Capital Outlay (OCO)	\$1,229,700	\$2,740,914	\$2,786,293	\$45,379	8 BTs Not Material
20. Library Resources	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	
25. Transfers	\$0	\$0	\$0	\$0	
26. Fixed Capital Outlay (FCO)	\$1,124,400	\$6,796,869	\$7,721,969	\$925,100	8 BTs \$696.3K Visitor Cntr Redesign, \$306.6K 300k Gal Water Tower Moved from Expense
27. Total Resources Used	\$46,962,748	\$41,764,037	\$41,764,037	\$0	
Net Change	(\$46,962,748)	(\$41,764,037)	(\$41,764,037)	\$0	
Statutory Carryforward Cash Reserve	(\$12,934,050)	(\$12,560,286)	(\$12,560,286)	\$0	
Ending Balance	\$0	\$0	\$0	\$0	

University of West Florida
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	BOT Approved FY2024-2025 Budget	Current Modified Budget as of 06-30-2025	3 Yr Historical Avg % of Budget	Y-T-D Estimated Budget Based On a 3 Year Average	Actuals as of 06-30-2025	Over /(Under) Estimated Budget	Encumbrances as of 06-30-2025	Notes & Comments
Beginning Balance	\$59,896,798	\$54,324,323	100.00%	\$0	\$54,324,323	\$0	\$0	
Revenues & Transfers In:								
1. State Appropriated Funds	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
7. Fees	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
8. Miscellaneous Receipts	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
9. Other Grants & Donations	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
10. Rent	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
11. U.S. Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$0	\$0		\$0	\$0	\$0	\$0	
15. Total Resources Available	\$59,896,798	\$54,324,323		\$0	\$54,324,323	\$0	\$0	
Expenditures & Transfers Out:								
16. Salaries & Benefits	\$1,008,400	\$1,494,056	68.50%	\$1,023,503	\$1,242,320	\$218,817	\$0	
17. Other Personal Services (OPS)	\$1,231,400	\$584,918	83.85%	\$490,437	\$795,815	\$305,378	\$0	
18. Expenses	\$42,368,848	\$29,176,801	67.57%	\$19,714,411	\$10,814,739	(\$8,899,672)	\$630,776	In line with Spndg Plans
19. Other Capital Outlay (OCO)	\$1,229,700	\$2,786,293	26.68%	\$743,266	\$1,216,794	\$473,528	\$947,453	
20. Library Resources	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
25. Transfers	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
26. Fixed Capital Outlay (FCO)	\$1,124,400	\$7,721,969	24.83%	\$1,917,192	\$3,839,443	\$1,922,251	\$2,660,668	Actual and Encumbrances are Larger than Est, but in keeping with Spndg Plans
27. Total Resources Used	\$46,962,748	\$41,764,037		\$23,888,809	\$17,909,111	(\$5,979,698)	\$4,238,897	
Net Change	(\$46,962,748)	(\$41,764,037)		(\$23,888,809)	(\$17,909,111)			
Statutory Carryforward Cash Reserve	(\$12,934,050)	(\$12,560,286)		\$0	(\$12,560,286)	\$0	\$0	
Ending Balance	\$0	\$0		(\$23,888,809)	\$23,854,926			

University of West Florida
Carry Forward
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	Actuals as of 06-30-2022	Actuals as of 06-30-2023	Actuals as of 06-30-2024	Actuals as of 06-30-2025
Beginning Balance	\$21,284,232	\$24,863,612	\$30,502,028	\$54,324,323
Revenues & Transfers In:				
1. State Appropriated Funds	\$0	\$0	\$0	\$0
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$0	\$0	\$0	\$0
7. Fees	\$0	\$0	\$0	\$0
8. Miscellaneous Receipts	\$0	\$0	\$0	\$0
9. Other Grants & Donations	\$0	\$0	\$0	\$0
10. Rent	\$0	\$0	\$0	\$0
11. U.S. Grants	\$0	\$0	\$0	\$0
12. City, County & State Grants	\$0	\$0	\$0	\$0
13. Other Revenue	\$0	\$0	\$0	\$0
14. Total Additions to Fund Balance	\$0	\$0	\$0	\$0
15. Total Resources Available	\$21,284,232	\$24,863,612	\$30,502,028	\$54,324,323
Expenditures & Transfers Out:				
16. Salaries & Benefits	\$270,553	\$418,223	\$516,356	\$1,242,320
17. Other Personal Services (OPS)	\$63,370	\$412,916	\$611,064	\$795,815
18. Expenses	\$6,200,281	\$6,322,518	\$6,706,293	\$10,814,739
19. Other Capital Outlay (OCO)	\$162,245	\$287,847	\$561,385	\$1,216,794
20. Library Resources	\$0	\$0	\$0	\$0
21. Risk Management	\$0	\$0	\$0	\$0
22. Financial Aid	\$0	\$0	\$0	\$0
23. Debt Service	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0
25. Transfers	\$0	\$0	\$0	\$0
26. Fixed Capital Outlay (FCO)	\$0	\$784,815	\$2,266,206	\$3,839,443
27. Total Resources Used	\$6,696,449	\$8,226,319	\$10,661,304	\$17,909,111
Net Change	(\$6,696,449)	(\$8,226,319)	(\$10,661,304)	(\$17,909,111)
Statutory Carryforward Cash Reserve	\$0	\$0	(\$8,996,954)	(\$12,560,286)
Ending Balance	\$14,587,783	\$16,637,293	\$10,843,770	\$23,854,926

University of West Florida
Auxiliaries
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	BOT Approved FY2024-2025 Budget	Prior Quarter Modified Budget as of 03-31- 2025	Current Modified Budget as of 06-30-2025	Change	Notes & Comments
Beginning Balance	\$56,065,363	\$57,136,250	\$57,136,250	\$0	
Revenues & Transfers In:					
1. State Appropriated Funds	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$1,807,000	\$1,807,000	\$1,807,000	\$0	
7. Fees	\$38,251,100	\$38,251,100	\$38,251,100	\$0	
8. Miscellaneous Receipts	\$5,344,700	\$5,344,700	\$5,344,700	\$0	
9. Other Grants & Donations	\$80,000	\$80,000	\$80,000	\$0	
10. Rent	\$393,800	\$393,800	\$393,800	\$0	
11. U.S. Grants	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	\$0	\$0	
13. Other Revenue	\$2,689,600	\$2,689,600	\$2,689,600	\$0	
14. Total Additions to Fund Balance	\$48,566,200	\$48,566,200	\$48,566,200	\$0	
15. Total Resources Available	\$104,631,563	\$105,702,450	\$105,702,450	\$0	
Expenditures & Transfers Out:					
16. Salaries & Benefits	\$14,001,500	\$15,578,015	\$16,636,127	\$1,058,112	95 BTs \$565.4K Cont Ed Prgms, \$220.7K COSE, & \$186.7K COB
17. Other Personal Services (OPS)	\$5,157,100	\$6,180,085	\$6,657,876	\$477,791	75 BTs \$460.8K Cont Ed Prgms
18. Expenses	\$19,919,800	\$25,845,406	\$27,659,195	\$1,813,789	139 BTs \$1.2M Nursing MSN & Other CE Prog, \$142.7K Univ Admin
19. Other Capital Outlay (OCO)	\$226,400	\$565,621	\$535,522	(\$30,099)	4 BTs Not Material
20. Library Resources	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	
25. Transfers	\$2,592,400	\$2,592,400	\$2,592,400	\$0	89 BTs Not Material
26. Fixed Capital Outlay (FCO)	\$4,934,000	\$3,895,716	\$7,631,377	\$3,735,661	12 BTs \$3.4M B236 Campus Stadm, \$296.5K Visit Ctr Redgn, \$155.8K E15 Sball Lights
27. Total Resources Used	\$46,831,200	\$54,657,243	\$61,712,497	\$7,055,254	
Net Change	\$1,735,000	(\$6,091,043)	(\$13,146,297)	\$7,055,254	
Ending Balance	\$57,800,363	\$51,045,207	\$43,989,953	\$7,055,254	

University of West Florida
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	BOT Approved FY2024-2025 Budget	Current Modified Budget as of 06-30-2025	3 Yr Historical Avg % of Budget	Y-T-D Estimated Budget Based On a 3 Year Average	Actuals as of 06-30-2025	Over /(Under) Estimated Budget	Encumbrances as of 06-30-2025	Notes & Comments
Beginning Balance	\$56,065,363	\$57,136,250	100.00%	\$57,136,250	\$57,136,250	\$0	\$0	
Revenues & Transfers In:								
1. State Appropriated Funds	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$1,807,000	\$1,807,000	103.28%	\$1,866,296	\$1,815,125	(\$51,171)	\$0	
7. Fees	\$38,251,100	\$38,251,100	115.29%	\$44,101,286	\$38,619,452	(\$5,481,834)	\$0	Actual is in line with Est Budg
8. Miscellaneous Receipts	\$5,344,700	\$5,344,700	81.79%	\$4,371,384	\$4,905,642	\$534,258	\$0	CY Budget is Greater than 3-yr Avg due to Inc Enrollment
9. Other Grants & Donations	\$80,000	\$80,000	472.21%	\$377,764	\$2,741,883	\$2,364,119	\$0	Incr Due to Foundation Donation for SS Sports Med Ctr
10. Rent	\$393,800	\$393,800	103.46%	\$407,429	\$405,167	(\$2,262)	\$0	
11. U.S. Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
13. Other Revenue	\$2,689,600	\$2,689,600	169.69%	\$4,564,034	\$5,290,955	\$726,921	\$0	Sales incre in Food/Books/& Other Services and Investment returns.
14. Total Additions to Fund Balance	\$48,566,200	\$48,566,200		\$55,688,193	\$53,778,224	(\$1,909,969)	\$0	
15. Total Resources Available	\$104,631,563	\$105,702,450		\$112,824,443	\$110,914,474	(\$1,909,969)	\$0	
Expenditures & Transfers Out:								
16. Salaries & Benefits	\$14,001,500	\$16,636,127	92.41%	\$15,373,039	\$14,912,736	(\$460,303)	\$0	
17. Other Personal Services (OPS)	\$5,157,100	\$6,657,876	91.95%	\$6,121,949	\$5,681,599	(\$440,350)	\$0	
18. Expenses	\$19,919,800	\$27,659,195	70.57%	\$19,517,743	\$20,164,781	\$647,038	\$1,065,034	Actual is Greater than Est due to SS Dorm Demolition Proj & Incr CE Spending
19. Other Capital Outlay (OCO)	\$226,400	\$535,522	42.05%	\$225,195	\$122,557	(\$102,638)	\$174,476	
20. Library Resources	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
25. Transfers	\$2,592,400	\$2,592,400	35.31%	\$915,452	\$1,162,900	\$247,448	\$0	
26. Fixed Capital Outlay (FCO)	\$4,934,000	\$7,631,377	27.71%	\$2,114,566	\$3,230,489	\$1,115,923	\$3,830,106	Act and Enc Greater than Est due to SS Sports Med Ctr
27. Total Resources Used	\$46,831,200	\$61,712,497		\$44,267,944	\$45,275,062	\$1,007,118	\$5,069,616	
Net Change	\$1,735,000	(\$13,146,297)		\$11,420,249	\$8,503,162			
Ending Balance	\$57,800,363	\$43,989,953		\$68,556,499	\$65,639,412			

**University of West Florida
Auxiliaries
Fourth Quarter
For the Fiscal Year Ending June 30, 2025**

	Actuals as of 06-30-2022	Actuals as of 06-30-2023	Actuals as of 06-30-2024	Actuals as of 06-30-2025
Beginning Balance	\$40,615,139	\$49,981,020	\$49,965,263	\$57,136,250
Revenues & Transfers In:				
1. State Appropriated Funds	\$0	\$0	\$0	\$0
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$1,592,322	\$1,640,406	\$1,792,821	\$1,815,125
7. Fees	\$27,200,185	\$28,647,176	\$33,789,696	\$38,619,452
8. Miscellaneous Receipts	\$2,643,853	\$3,199,297	\$3,861,845	\$4,905,642
9. Other Grants & Donations	\$70,861	\$89,086	\$890,362	\$2,741,883
10. Rent	\$383,283	\$354,034	\$306,838	\$405,167
11. U.S. Grants	\$0	\$0	\$0	\$0
12. City, County & State Grants	\$0	\$0	\$0	\$0
13. Other Revenue	\$4,556,998	\$4,434,765	\$5,988,225	\$5,290,955
14. Total Additions to Fund Balance	\$36,447,502	\$38,364,764	\$46,629,787	\$53,778,224
15. Total Resources Available	\$77,062,641	\$88,345,784	\$96,595,050	\$110,914,474
Expenditures & Transfers Out:				
16. Salaries & Benefits	\$11,815,936	\$12,000,102	\$12,914,813	\$14,912,736
17. Other Personal Services (OPS)	\$4,076,204	\$4,076,149	\$5,117,254	\$5,681,599
18. Expenses	\$12,130,358	\$18,871,948	\$18,187,411	\$20,164,781
19. Other Capital Outlay (OCO)	\$53,953	\$1,652,253	\$266,501	\$122,557
20. Library Resources	\$0	\$0	\$0	\$0
21. Risk Management	\$0	\$0	\$0	\$0
22. Financial Aid	\$0	\$0	\$0	\$0
23. Debt Service	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0
25. Transfers	(\$1,277,095)	\$1,285,746	\$1,336,763	\$1,162,900
26. Fixed Capital Outlay (FCO)	\$282,266	\$494,321	\$1,636,058	\$3,230,489
27. Total Resources Used	\$27,081,622	\$38,380,519	\$39,458,800	\$45,275,062
Net Change	\$9,365,880	(\$15,755)	\$7,170,987	\$8,503,162
Ending Balance	\$49,981,019	\$49,965,265	\$57,136,250	\$65,639,412

University of West Florida
Athletics
Fourth Quarter
For the Fiscal Year Ending June 30, 2025

	BOT Approved FY2024-2025 Budget	Prior Quarter Modified Budget as of 03-31- 2025	Current Modified Budget as of 06-30-2025	Change	Notes & Comments
Beginning Balance	\$16,171	\$267,390	\$267,390	\$0	
Revenues & Transfers In:					
1. State Appropriated Funds	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$280,000	\$280,000	\$280,000	\$0	
7. Fees	\$5,500,000	\$5,500,000	\$5,500,000	\$0	
8. Miscellaneous Receipts	\$949,000	\$949,000	\$949,000	\$0	
9. Other Grants & Donations	\$0	\$0	\$0	\$0	
10. Rent	\$8,000	\$8,000	\$8,000	\$0	
11. U.S. Grants	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$6,737,000	\$6,737,000	\$6,737,000	\$0	
15. Total Resources Available	\$6,753,171	\$7,004,390	\$7,004,390	\$0	
Expenditures & Transfers Out:					
16. Salaries & Benefits	\$3,288,900	\$3,142,494	\$2,934,836	(\$207,658)	28 BTs Not Material
17. Other Personal Services (OPS)	\$500,600	\$528,650	\$517,111	(\$11,539)	26 BTs Not Material
18. Expenses	\$3,358,900	\$3,845,851	\$4,527,718	\$681,867	71 BTs \$305.7K Fndtn Trnsfrs, \$110.8K From Sal Svgs, \$95.8K Trnf of Avail Cash
19. Other Capital Outlay (OCO)	\$0	\$156,979	\$111,599	(\$45,380)	3 BT Not Material
20. Library Resources	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	
25. Transfers	(\$411,400)	(\$411,400)	(\$206,561)	\$204,839	55 BTs Not Material
26. Fixed Capital Outlay (FCO)	\$0	\$270,100	\$245,838	(\$24,262)	3 BT Not Material
27. Total Resources Used	\$6,737,000	\$7,532,674	\$8,130,541	\$597,867	
Net Change	\$0	(\$795,674)	(\$1,393,541)	\$597,867	
Ending Balance	\$16,171	(\$528,284)	(\$1,126,151)	\$597,867	

University of West Florida
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	BOT Approved FY2024-2025 Budget	Current Modified Budget as of 06-30-2025	3 Yr Historical Avg % of Budget	Y-T-D Estimated Budget Based On a 3 Year Average	Actuals as of 06-30-2025	Over /(Under) Estimated Budget	Encumbrances as of 06-30-2025	Notes & Comments
Beginning Balance	\$16,171	\$267,390	100.00%	\$267,390	\$267,390	\$0	\$0	
Revenues & Transfers In:								
1. State Appropriated Funds	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$280,000	\$280,000	75.24%	\$210,669	\$269,821	\$59,152	\$0	
7. Fees	\$5,500,000	\$5,500,000	101.24%	\$5,568,120	\$5,514,445	(\$53,675)	\$0	
8. Miscellaneous Receipts	\$949,000	\$949,000	113.31%	\$1,075,299	\$1,532,059	\$456,760	\$0	Rev up due to Foundation Receipts
9. Other Grants & Donations	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
10. Rent	\$8,000	\$8,000	118.20%	\$9,456	\$12,078	\$2,622	\$0	
11. U.S. Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	0.00%	\$0	\$445	\$445	\$0	
13. Other Revenue	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$6,737,000	\$6,737,000		\$6,863,544	\$7,328,848	\$465,304	\$0	
15. Total Resources Available	\$6,753,171	\$7,004,390		\$7,130,934	\$7,596,238	\$465,304	\$0	
Expenditures & Transfers Out:								
16. Salaries & Benefits	\$3,288,900	\$2,934,836	98.86%	\$2,901,352	\$2,934,648	\$33,296	\$0	
17. Other Personal Services (OPS)	\$500,600	\$517,111	90.14%	\$466,106	\$514,935	\$48,829	\$0	
18. Expenses	\$3,358,900	\$4,527,718	83.67%	\$3,788,556	\$4,462,367	\$673,811	\$14,000	Exps up for Medical Claims, Waivers, & Other Operating Exps
19. Other Capital Outlay (OCO)	\$0	\$111,599	32.82%	\$36,626	\$122,684	\$86,058	\$0	
20. Library Resources	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
25. Transfers	(\$411,400)	(\$206,561)	235.23%	(\$485,898)	(\$772,219)	(\$286,321)	\$0	
26. Fixed Capital Outlay (FCO)	\$0	\$245,838	45.84%	\$112,694	\$237,763	\$125,069	\$8,075	
27. Total Resources Used	\$6,737,000	\$8,130,541		\$6,819,436	\$7,500,178	\$680,742	\$22,075	
Net Change	\$0	(\$1,393,541)		\$44,108	(\$171,330)			
Ending Balance	\$16,171	(\$1,126,151)		\$311,498	\$96,060			

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	Actuals as of 06-30-2022	Actuals as of 06-30-2023	Actuals as of 06-30-2024	Actuals as of 06-30-2025
Beginning Balance	\$831,417	\$331,978	(\$39,929)	\$267,390
Revenues & Transfers In:				
1. State Appropriated Funds	\$0	\$0	\$0	\$0
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$18,939	\$413,989	\$194,391	\$269,821
7. Fees	\$5,001,509	\$4,790,095	\$5,309,899	\$5,514,445
8. Miscellaneous Receipts	\$361,016	\$1,300,325	\$1,620,361	\$1,532,059
9. Other Grants & Donations	\$7,199	\$0	\$0	\$0
10. Rent	\$0	\$10,777	\$12,834	\$12,078
11. U.S. Grants	\$0	\$0	\$0	\$0
12. City, County & State Grants	\$0	\$0	\$0	\$445
13. Other Revenue	\$6,223	\$862	\$545	\$0
14. Total Additions to Fund Balance	\$5,394,886	\$6,516,048	\$7,138,030	\$7,328,848
15. Total Resources Available	\$6,226,303	\$6,848,026	\$7,098,101	\$7,596,238
Expenditures & Transfers Out:				
16. Salaries & Benefits	\$2,817,016	\$3,036,908	\$2,993,619	\$2,934,648
17. Other Personal Services (OPS)	\$291,178	\$454,070	\$484,318	\$514,935
18. Expenses	\$2,168,149	\$3,907,253	\$3,962,108	\$4,462,367
19. Other Capital Outlay (OCO)	\$69,753	\$0	\$21,833	\$122,684
20. Library Resources	\$0	\$0	\$0	\$0
21. Risk Management	\$0	\$0	\$0	\$0
22. Financial Aid	\$0	\$0	\$0	\$0
23. Debt Service	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0
25. Transfers	(\$274,344)	(\$523,652)	(\$648,342)	(\$772,219)
26. Fixed Capital Outlay (FCO)	\$0	\$13,377	\$17,175	\$237,763
27. Total Resources Used	\$5,071,752	\$6,887,956	\$6,830,711	\$7,500,178
Net Change	\$323,134	(\$371,908)	\$307,319	(\$171,330)
Ending Balance	\$1,154,551	(\$39,930)	\$267,390	\$96,060

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	BOT Approved FY2024-2025 Budget	Prior Quarter Modified Budget as of 03-31- 2025	Current Modified Budget as of 06-30-2025	Change	Notes & Comments
Beginning Balance	\$1,858,892	\$2,052,029	\$2,052,029	\$0	
Revenues & Transfers In:					
1. State Appropriated Funds	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$0	\$0	\$0	\$0	
7. Fees	\$3,639,100	\$3,639,100	\$3,639,100	\$0	
8. Miscellaneous Receipts	\$0	\$0	\$0	\$0	
9. Other Grants & Donations	\$0	\$0	\$0	\$0	
10. Rent	\$0	\$0	\$0	\$0	
11. U.S. Grants	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$3,639,100	\$3,639,100	\$3,639,100	\$0	
15. Total Resources Available	\$5,497,992	\$5,691,129	\$5,691,129	\$0	
Expenditures & Transfers Out:					
16. Salaries & Benefits	\$1,937,100	\$1,937,142	\$1,968,276	\$31,134	4 BTs Not Material
17. Other Personal Services (OPS)	\$1,175,200	\$1,178,705	\$1,124,148	(\$54,557)	7 BTs Not Material
18. Expenses	\$629,800	\$1,267,599	\$1,333,420	\$65,821	11 BTs Not Material
19. Other Capital Outlay (OCO)	\$0	\$0	\$23,515	\$23,515	2 BTs Not Material
20. Library Resources	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0	
25. Transfers	\$247,100	\$430,000	\$440,000	\$10,000	3 BTs Not Material
26. Fixed Capital Outlay (FCO)	\$0	\$0	\$0	\$0	
27. Total Resources Used	\$3,989,200	\$4,813,446	\$4,889,359	\$75,913	
Net Change	(\$350,100)	(\$1,174,346)	(\$1,250,259)	\$75,913	
Ending Balance	\$1,508,792	\$877,683	\$801,770	\$75,913	

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	BOT Approved FY2024-2025 Budget	Current Modified Budget as of 06-30-2025	3 Yr Historical Avg % of Budget	Y-T-D Estimated Budget Based On a 3 Year Average	Actuals as of 06-30-2025	Over /(Under) Estimated Budget	Encumbrances as of 06-30-2025	Notes & Comments
Beginning Balance	\$1,858,892	\$2,052,029	100.00%	\$2,052,029	\$2,052,029	\$0	\$0	
Revenues & Transfers In:								
1. State Appropriated Funds	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
2. Enhancement Trust Fund (Lottery)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
3. Student Fee Trust Fund (Tuition)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
4. Federal Grants Trust Fund (Education)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
6. Sales of Goods & Services	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
7. Fees	\$3,639,100	\$3,639,100	99.51%	\$3,621,308	\$3,591,633	(\$29,675)	\$0	
8. Miscellaneous Receipts	\$0	\$0	0.00%	\$0	\$507	\$507	\$0	
9. Other Grants & Donations	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
10. Rent	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
11. U.S. Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
12. City, County & State Grants	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
13. Other Revenue	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
14. Total Additions to Fund Balance	\$3,639,100	\$3,639,100		\$3,621,308	\$3,592,140	(\$29,168)	\$0	
15. Total Resources Available	\$5,497,992	\$5,691,129		\$5,673,337	\$5,644,169	(\$29,168)	\$0	
Expenditures & Transfers Out:								
16. Salaries & Benefits	\$1,937,100	\$1,968,276	90.56%	\$1,782,415	\$1,856,882	\$74,467	\$0	
17. Other Personal Services (OPS)	\$1,175,200	\$1,124,148	111.52%	\$1,253,622	\$999,595	(\$254,027)	\$0	
18. Expenses	\$629,800	\$1,333,420	52.01%	\$693,516	\$778,917	\$85,401	\$3,000	
19. Other Capital Outlay (OCO)	\$0	\$23,515	100.96%	\$23,740	\$23,515	(\$225)	\$0	
20. Library Resources	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
21. Risk Management	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
22. Financial Aid	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
23. Debt Service	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
24. Expenditures From Carry Forward	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
25. Transfers	\$247,100	\$440,000	94.44%	\$415,553	\$435,645	\$20,092	\$0	
26. Fixed Capital Outlay (FCO)	\$0	\$0	0.00%	\$0	\$0	\$0	\$0	
27. Total Resources Used	\$3,989,200	\$4,889,359		\$4,168,846	\$4,094,554	(\$74,292)	\$3,000	
Net Change	(\$350,100)	(\$1,250,259)		(\$547,538)	(\$502,414)			
Ending Balance	\$1,508,792	\$801,770		\$1,504,491	\$1,549,615			

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	Actuals as of 06-30-2022	Actuals as of 06-30-2023	Actuals as of 06-30-2024	Actuals as of 06-30-2025
Beginning Balance	\$2,215,421	\$2,614,533	\$2,168,792	\$2,052,029
Revenues & Transfers In:				
1. State Appropriated Funds	\$0	\$0	\$0	\$0
2. Enhancement Trust Fund (Lottery)	\$0	\$0	\$0	\$0
3. Student Fee Trust Fund (Tuition)	\$0	\$0	\$0	\$0
4. Federal Grants Trust Fund (Education)	\$0	\$0	\$0	\$0
5. Federal Grants Trust Fund (Discretionary)	\$0	\$0	\$0	\$0
6. Sales of Goods & Services	\$0	(\$1,617)	\$0	\$0
7. Fees	\$3,239,564	\$3,115,411	\$3,424,843	\$3,591,633
8. Miscellaneous Receipts	\$0	(\$20)	\$0	\$507
9. Other Grants & Donations	\$0	\$0	\$0	\$0
10. Rent	\$0	\$0	\$0	\$0
11. U.S. Grants	\$0	\$0	\$0	\$0
12. City, County & State Grants	\$0	\$0	\$0	\$0
13. Other Revenue	\$0	\$0	\$0	\$0
14. Total Additions to Fund Balance	\$3,239,564	\$3,113,774	\$3,424,843	\$3,592,140
15. Total Resources Available	\$5,454,985	\$5,728,307	\$5,593,635	\$5,644,169
Expenditures & Transfers Out:				
16. Salaries & Benefits	\$1,452,254	\$1,530,756	\$1,434,617	\$1,856,882
17. Other Personal Services (OPS)	\$609,469	\$823,363	\$961,738	\$999,595
18. Expenses	\$408,244	\$893,301	\$789,322	\$778,917
19. Other Capital Outlay (OCO)	\$10,000	\$41,700	\$2,037	\$23,515
20. Library Resources	\$0	\$0	\$0	\$0
21. Risk Management	\$0	\$0	\$0	\$0
22. Financial Aid	\$0	\$0	\$0	\$0
23. Debt Service	\$0	\$0	\$0	\$0
24. Expenditures From Carry Forward	\$0	\$0	\$0	\$0
25. Transfers	\$396,641	\$270,396	\$353,892	\$435,645
26. Fixed Capital Outlay (FCO)	\$0	\$0	\$0	\$0
27. Total Resources Used	\$2,876,608	\$3,559,516	\$3,541,606	\$4,094,554
Net Change	\$362,956	(\$445,742)	(\$116,763)	(\$502,414)
Ending Balance	\$2,578,377	\$2,168,791	\$2,052,029	\$1,549,615

9.007 State University Operating Budgets and Requests

(1) Each university president shall prepare an operating budget, including an Education & General (E&G) Carryforward Spending Plan, for approval by the university board of trustees in accordance with instructions, guidelines and standard formats provided by the Board of Governors.

(2) Each university board of trustees shall adopt an operating budget, including an E&G Carryforward Spending Plan, for the general operation of the university as prescribed by the regulations of the Board of Governors. The university board of trustees-ratified operating budget and E&G Carryforward Spending Plan must be presented to the Board of Governors for approval by a date established by the Chancellor. Each university president shall implement the operating budget and E&G Carryforward Spending Plan of the university as prescribed by Florida Statutes, regulations of the Board of Governors, policies of the university board of trustees, provisions of the General Appropriations Act, and data reflected within the State University System Allocation Summary and Workpapers publication.

(3) The operating budgets of each state university shall consist of the following budget entities:

(a) Education and General (E&G)– reports actual and estimated fiscal year operating revenues and expenditures for all E&G funds, including: General Revenue, Student and Other Fees Trust Fund, Educational Enhancement Trust Fund (Lottery), Phosphate Research Trust Fund, – and including the following previously-appropriated trust funds: Experiment Station Federal Grant, Experiment Station Incidental, Extension Service Federal Grant, Extension Service Incidental, UF-HSC Incidental, and UF-Health Science Center Operations and Maintenance. In addition, expenditures from university E&G carryforward funds (unexpended balances from all prior-period E&G appropriations) shall be included in the actual history fiscal year reporting. University budgeted E&G carryforward funds shall be reported in the E&G Carryforward Spending Plan Report.

1. Otherwise by law, E&G funds are to be used for E&G activities only, such as, but not limited to, general instruction, research, public service, plant operations and maintenance as defined in Board of Governors guidelines, furniture, fixtures, and equipment, student services, libraries, administrative support, minor capital projects not to exceed \$1 million per individual project, and other enrollment-related and stand-alone operations of the universities.
2. Universities shall accumulate ending E&G fund balances for activities such as those outlined in section 3(a)(4). The ending E&G carryforward balances can only be used for nonrecurring expenditures. At any time the unencumbered available balance in the E&G fund of the university board of trustees approved operating budget falls below seven (7) percent of the approved total, the university shall provide a written notification and plan to the Board of Governors to attain a seven (7) percent balance of state operating funds within the next fiscal year.

3. Each university that retains a state operating fund carryforward balance in excess of the seven (7) percent minimum shall submit an E&G Carryforward Spending Plan for its excess carry forward balance. The Carryforward Spending Plan shall be submitted to the university's board of trustees for review, approval, or if necessary, amendment by September 1, 2020, and each September 1 thereafter. The Board of Governors shall review, approve, and amend, if necessary, each university's E&G Carryforward Spending Plan by October 1, 2020, and each October 1 thereafter.
4. A university's E&G Carryforward Spending Plan shall include the estimated cost per planned expenditure and a projected timeline for completion of the expenditure. Authorized expenditures in an E&G Carryforward Spending Plan may include:
 - a. Commitment of funds to a public education capital outlay project for which an appropriation has previously been provided that requires additional funds for completion and which is included in the list required by section 1001.706(12)(d);
 - b. Completion of a renovation, repair, or maintenance project (as defined in Board Regulation 14.001) that is consistent with the provisions of section 1013.64(1), up to \$5 million per project and replacement of a minor facility that does not exceed 10,000 gross square feet in size up to \$2 million;
 - c. Completion of a remodeling or infrastructure project (as defined in Board Regulation 14.001), including a project for a developmental research school, up to \$10 million per project, if such project is survey recommended pursuant to section 1013.31;
 - d. Completion of a repair or replacement project necessary due to damage caused by a natural disaster for buildings included in the inventory required pursuant to section 1013.31;
 - e. Operating expenditures that support the university mission and that are nonrecurring; and
 - f. Any purpose specified by the university board of trustees or in the General Appropriations Act.
5. Annually, by September 30, the chief financial officer of each university shall certify the unexpended amount of funds appropriated to the university from the General Revenue Fund, the Educational Enhancement Trust Fund, and the Student and Other Fees Trust Fund as of June 30 of the previous fiscal year.
6. A University may spend the minimum carry forward balance of seven (7) percent if a demonstrated emergency exists and the plan is approved by the university's board of trustees and the Board of Governors.
7. Expenditures from any source of funds by any university shall not exceed the funds available. No expenditure of funds, contract, or agreement of any nature shall be made that requires additional appropriation of state funds by the Legislature unless specifically authorized in advance by law or the General Appropriations Act.
8. The following units are required to report under this budget entity:
 - State Universities
 - UF - Institute of Food and Agricultural Sciences
 - UF Health Science Center
 - USF Medical Center

FSU Medical School
UCF Medical School
FIU Medical School
FAU Medical School
FAMU-FSU College of Engineering
Florida Postsecondary Comprehensive Transition Program (UCF)

- (b) Contracts and Grants – reports actual and estimated year revenues, expenditures, and positions for university functions which are supported by foundations, various state and federal agencies, local units of governments, businesses, and industries. Universities shall comply with all applicable federal, state, local, and university regulations and guidelines as they relate to grants, contracts, and sponsored research programs.
- (c) Auxiliary Enterprises – reports actual and estimated year revenues, expenditures, and positions for self-supporting functions such as, but not limited to, parking services, housing, bookstore operations, and food services.
- (d) Local Funds – reports actual and estimated year revenues, expenditures, and positions for the following specific areas:
 - 1. Student Activities – revenues generated primarily from the activity and service fee each university is authorized to charge its students as a component of the mandatory fee schedule. Activities commonly supported by these revenues include student government, cultural events, student organizations, and intramural/club events.
 - 2. Intercollegiate Athletics – revenues generated from the student athletic fee that each university is authorized to collect as a component of the mandatory fee schedule, and from other sources including ticket sales, radio/TV, bowl games, and tournament revenues.
 - 3. Concession Fund – revenues generated from various vending activities located around the campuses. The university's budget must reflect the various departments/activities on each campus which benefit from receipt of these funds.
 - 4. Student Financial Aid – revenues received by the university for loans, grants, scholarships, and other student financial aid. Expenditures of these funds must be reported by activities such as externally-funded loans, student scholarships, need-based financial aid, academic-based financial aid, and athletic grants/scholarships.
 - 5. Technology Fee – revenues generated from the technology fee that a university is authorized to charge its students as a component of the mandatory fee schedule. Proceeds from this fee shall be used to enhance instructional technology resources for students and faculty.
 - 6. Board-Approved Fees – student fees presented to the Board of Governors for approval by a university board of trustees that is intended to address a student need not currently being met through existing university services, operations, or another fee.
 - 7. Self-Insurance Programs – revenues received by the university from entities and individuals protected by the self-insurance programs. This budget must

reflect expenditures related to the administration of the self-insurance programs and the judgments or claims arising out of activities for which the self-insurance program was created.

- (e) Faculty Practice Plan – related to the activities for the state universities’ medical schools and health centers. This budget must be designed to report the monetary level of clinical activity regarding the training of students, post-graduate health professionals, and medical faculty.
- (4) The operating budgets of each university shall represent the following:
- (a) The university’s plan for utilizing the resources available through direct or continuing appropriations by the Legislature, allocation amendments, or from local sources including student tuition and fees. The provisions of the General Appropriations Act and the State University System Allocation Summary and Workpapers publication will be taken into consideration in the development and preparation of the E&G data.
 - (b) Actual prior-year revenues, expenditures (including E&G carryforward amounts expended), and positions, as well as current-year estimated revenues, expenditures, and positions. University E&G carryforward funds shall be budgeted in the E&G Carryforward Spending Plan.
 - (c) Assurance that the universities are in compliance with general legislative intent for expenditure of the appropriated state funds and with the Board of Governors’ regulations, guidelines and priorities for all funding sources
- (5) Any earnings (interest, investment, or other) resulting from the investment of current-year E&G appropriations are considered to be of the same nature as the original appropriations, and are subject to the same expenditure regulations as the original appropriations. E&G earnings are not to be utilized for non-E&G related activities or for fixed capital outlay activities except as provided by law. Earnings resulting from invested E&G carryforward funds are considered to be additions to the university’s E&G carryforward balance and shall be expended in accordance with section (3)(a) of this regulation.
- Anticipated earnings for the estimated year from invested E&G funds should not be included when building the detailed operating budget schedules. Estimated-year E&G earnings and planned expenditures of these funds should only be reported on the manually-prepared E&G Schedule I and Summary Schedule I reports.
- (6) Any unexpended E&G appropriation carried forward to the fund balance in a new fiscal year shall be utilized in support of nonrecurring E&G activities only unless otherwise provided by law.
- (7) E&G non-recurring is defined as an expenditure that is not expected to be needed or available after a point in time. Non-recurring expenditures have distinct elements:
- (a) Time limited in nature, where an end date to a given contract or activity is known,
 - (b) There is no promise or guarantee of future funding,
 - (c) May cross multiple years, but the above two provisions apply,

(d) May address financial challenges resulting from external factors (examples could include, but are not limited to, federal government shutdown, drop in state revenue resulting in a mid-year reduction)

(8) Any amendments to the approved E&G Carryforward Spending Plan during the fiscal year shall be reported to the Board of Governors for a time period and in a format as prescribed by the Chancellor.

(9) Each university board of trustees may submit to the Chancellor's Office annually a Legislative Budget Request for operations. Such requests shall be made in accordance with the fiscal policy guidelines, formats, instructions, and schedule provided by the Chancellor.

Authority: Section 7(d), Art. IX, Fla. Const., History: New 12-6-07, Amended 11-21-13, 9-22-16, 10-30-19, x-xx-2020

Board of Trustees
Board Meeting
September 18, 2025

DSO Operating Budgets and Resources for FY 2024/25 and Certifications

Recommended Action:

No action required. This item is presented for information only.

Background Information:

Board of Governors Regulation 9.011, *University Direct Support Organizations (DSOs) and Health Services Support Organizations*, requires that the operating budgets of DSOs be prepared annually and approved by both the organization's governing board and the university's Board of Trustees.

Additionally, the University's March 2020 Operational Audit (Report No. 2020-152) issued by the Florida Auditor General recommended that the Trustees document their annual review and approval of each DSO's anticipated use of university resources before those resources are utilized. To promote transparency, the approved documentation should specify the employee positions providing personal services, the square footage of university facilities utilized, and the value of such use.

The University of West Florida has three DSOs: UWF Foundation, Inc.; UWF Historic Trust, Inc.; and UWF Business Enterprises, Inc. Each organization submitted its FY 2024–2025 Operating Budget and Resource Utilization Plan to the Board of Trustees for approval at the June 20, 2024, meeting. Presented here are the DSOs' certifications of resource use, consistent with their Memoranda of Understanding.

Implementation Plan:

Implementation will occur through the annual submission of each DSO's Operating Budget and Resource Utilization Plan, with continued Trustee oversight provided through review and acknowledgment at scheduled Board meetings.

Fiscal Implications:

The combined FY 2024–25 operating budgets of the University's three DSOs total approximately **\$30.7 million** in estimated revenues. In addition, the DSOs project use of approximately \$3.0 million in university resources, including personnel services and facility space.

Relevant Authority:

BOG REG 9.011 University Direct Support Organizations & Health Services Support Organizations

Supports Strategic Direction(s):

Strategic Direction 5: Infrastructure and Strategic Direction 6: Operational Excellence

Supporting Documents:

1. UWFF 2025 DSO Budget Certificate
2. UWFHT 2025 DSO Budget Certificate
3. UWF BEI 2025 DSO Budget Certificate
4. BOG REG 9.011 University Direct Support Organizations & Health Services Support Organizations

Prepared by:

- Howard Reddy, CEO UWF Historic Trust and CEO UWF Foundation
- Dan Lucas, Chief Financial Officer, University Advancement
- Robert Overton, Executive Director of UWFHT
- Dr. Ed Ranelli, Chief Executive Officer, UWF Business Enterprises, Inc.

Presenter:

Jeffrey A. Djerlek, Associate Vice President for Finance and University Controller



UWF Foundation, Inc.
11000 University Parkway
Building 12
Pensacola, FL 32514

July 21, 2025

Anna Lochas, Board of Trustees Liaison
c/o University of West Florida Board of Trustees
President's Office, Building 10 RM 234
11000 University Parkway
Pensacola, FL 32514

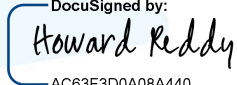
RE: UNIVERSITY RESOURCE ALLOCATION CERTIFICATION

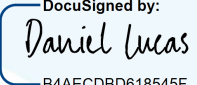
Dear University of West Florida Board of Trustees:

The University of West Florida Foundation, Inc. hereby certifies that all University resources allocated in the fiscal year ending June 30, 2025, were used only for the purposes approved by the Board of Trustees.

This certification is made pursuant to the Memorandum of Understanding approved on September 16, 2021, and entered into between University of West Florida ("the University"), acting for and on behalf of the University of West Florida Board of Trustees ("the Board of Trustees") and the University of West Florida Foundation, Inc. ("UWF Foundation" or "the Foundation"), acting on behalf of the University of West Florida Foundation, Inc. Board of Directors ("Foundation Board of Directors" or "the Foundation Board").

Respectfully,

DocuSigned by:

AC63F3D0A08A440...
Howard Reddy, CEO & President
UWF Foundation, Inc.

DocuSigned by:

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Daniel Lucas, CFO
UWF Foundation, Inc.

cc: Manny Diaz, UWF President
Betsy Bowers, Vice President, Finance and Administration
Jeffrey Djerlek, Associate Vice President of Finance/Controller
Susan Woolf, UWF General Counsel Office
Office - UWF Foundation, Inc.
Jessica Scholl, Moore, Hill, & Westmoreland, PA

office 850.474.3118
fax 850.474.2714
foundation@uwf.edu
uwf.edu/foundation

An Equal Opportunity/Equal Access Institution



July 22, 2025

University of West Florida Board of Trustees
11000 University Parkway,
Building 10 RM 102
Pensacola, FL 32514


RE: UNIVERSITY RESOURCE ALLOCATION CERTIFICATION

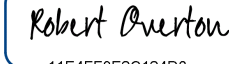
Dear University of West Florida Board of Trustees:

The University of West Florida Historic Trust hereby certifies that all University resources allocated in the fiscal year ending June 30, 2025, were used only for the purposes approved by the Board of Trustees. We also certify that the UWFHT is complying with the terms of the agreement and in a manner consistent with the goals, including historic preservation goals, and purposes of the University and in the best interest of the State

This certification is made pursuant to the Memorandum of Understanding approved on July 26, 2021, and entered into between University of West Florida ("the University"), acting for and on behalf of the University of West Florida Board of Trustees ("the Board of Trustees") and the University of West Florida Historic Trust ("Historic Trust"), acting on behalf of the University of West Florida Historic Trust Board of Directors ("Historic Trust Board of Directors").

Respectfully,

DocuSigned by:

AC63F3D0A08A440...
Howard Reddy, CEO
UWF Historic Trust

DocuSigned by:

11E4FF8E2C124D0...
Robert Overton, Jr.
UWF Historic Trust

cc: Manny Diaz, UWF President
Betsy Bowers, Vice President, Finance and Administration
Susan Woolf, UWF General Counsel Office
Jessica Scholl at Moore, Hill & Westmoreland, P.A.



July 31, 2025

University of West Florida Board of Trustees
11000 University Parkway, Building 10 RM 102
Pensacola, FL 32514

RE: UNIVERSITY RESOURCE ALLOCATION CERTIFICATION

Dear University of West Florida Board of Trustees:

The University of West Florida Business Enterprises, Inc. hereby certifies that all University resources allocated in the fiscal year ending June 30, 2025, were used only for the purposes approved by the Board of Trustees.

This certification is made pursuant to the Memorandum of Understanding approved on July 6, 2021, and entered into between University of West Florida ("the University"), acting for and on behalf of the University of West Florida Board of Trustees ("the Board of Trustees") and the University of West Florida Business Enterprises, Inc. ("UWF Business Enterprise" or "BEI"), acting on behalf of the University of West Florida Business Enterprises, Inc. Board of Directors ("BEI Board of Directors" or "the BEI Board").

Respectfully,

DocuSigned by:

Ed Ranelli

6128705D427B454...

Edward Ranelli, CEO

UWF Business Enterprises, Inc.

CC: Manny Diaz, Jr., UWF Interim President
Betsy Bowers, Vice President, Finance and Administration
Susan Woolf, UWF General Counsel

9.011 University Direct Support Organizations and Health Services Support Organizations

(1) University boards of trustees may establish direct support organizations (“DSO”) and health services support organizations and certify them to use university property, facilities and personal services. Such support organizations shall be organized and operated to serve the best interests or missions of the university, including a university’s research, education and service missions, and may receive, hold, invest, and administer property and make expenditures to or for the benefit of the university or for the benefit of a research and development park or research and development authority affiliated with a university.

(2) Each board of trustees shall establish by regulation conditions with which a support organization must comply in order to use university property, facilities, or personal services and such additional conditions, controls, and requirements for support organizations as each board deems appropriate to provide for budget and audit review and oversight. In addition, the regulation must include the following conditions:

- (a) The establishment of appropriate thresholds that delineate when approval by the board of trustees is required for the purchase of goods and services by a DSO.
- (b) All debt issued by a DSO is subject to the State University System Debt Management Guidelines and all public-private partnership transactions involving a DSO are subject to the State University System Public-Private Partnership Guidelines.
- (c) The establishment of appropriate thresholds that delineate when approval is required by the board of trustees for the acquisition of real property and the construction or renovation of facilities by a DSO.
- (d) University personal services used by a DSO are subject to the remuneration requirements set forth in section 1012.976, Florida Statutes.
- (e) A DSO is prohibited from using state funds for travel expenses incurred by the DSO.
- (f) A DSO is prohibited from giving, either directly, or indirectly, any gift to a political committee as defined in section 106.011, Florida Statutes, for any purpose.

(3) The Director or Chief Executive Officer of the support organization shall report to the University President or designee.

(4) Operating budgets of support organizations shall be prepared at least annually, and approved by the organization’s governing board and the university board of trustees. Significant changes in planned expenditures in the approved budget must be reported to the university board of trustees as soon as practicable but no later than the deadline established by a board of trustees.

(5) Support organizations shall provide for an annual audit conducted pursuant to university regulations or policies. The annual audit report shall be submitted to the university board of trustees for review. The audit report shall be submitted to the Board of Governors, and the Auditor General. The university board of trustees or designee, the Board of Governors, the Auditor General, and the Office of Program and Policy Analysis and Government Accountability may require and receive any records relative to the operation of a support organization from the organization or its independent auditors.

(6) Each support organization shall submit its federal Internal Revenue Service application for Recognition of Exemption form (Form 1023) and its federal Internal Revenue Service Return of Organization Exempt from Income Tax form (Form 990) to the university board of trustees or designee at the times required by the applicable regulation or policy of the board of trustees. Copies of such forms shall be provided by each university to the Board of Governors.

(7) As of July 1, 2019, any transfer of a state appropriation to a DSO is limited to funds pledged for capital projects.

- (a) This regulation does not prohibit the transfer of non-state funds between university DSOs, or the transfer of non-state funds to the DSO, as long as the original source of funding was not a state appropriation.
- (b) A DSO may transfer funds and provide the use of DSO property, facilities or personal services without any charge to the university.
- (c) Effective for fiscal 2018-2019, and annually thereafter, each university will report to the Legislature and the Board of Governors all transfers of state funds to each university DSO, using the format and instructions specified by the Chancellor.

(8) A support organization shall provide equal employment opportunities to all persons, regardless of race, color, national origin, sex, religion, age, disability, marital status, veteran status, or any other basis protected by law.

(9) The chair of the university board of trustees shall appoint at least one representative to each DSO board of directors and executive committee (if any). The university president or designee shall also serve on the board of directors and executive committee of each DSO. The university board of trustees shall approve all appointments to any DSO board other than the chair's representative(s) or the president or president's designee. The chair's designee may not be the university president; nor may the chair and president appoint the same person to represent both the chair and the president on any one DSO board.

(10) University boards of trustees shall decertify a support organization if the university board of trustees or designee determines that the organization is no longer serving the best interest or mission of the university and decertification is appropriate. In

decertifying a support organization, the board of trustees shall require an accounting of the organization's assets and liabilities and take such reasonable action as necessary to secure the return of all university property and facilities as requested by the university.

Authority: Section 7(d), Art. IX, Fla. Const., History – Formerly 6C-3.12, 11-18-70, Amended and Renumber 12-17-74, Amended 4-14-76, 6-25-80, 8-11-85, Formerly 6C-9.11, Amended 9-28-86, 2-13-89, 4-10-90, 12-9-91, 8-1-94, 4-16-96, Amended and Renumbered 8-6-09, Amended 11-8-18.



Board of Trustees
UNIVERSITY *of* WEST FLORIDA

Good of the Order



Board of Trustees
UNIVERSITY *of* WEST FLORIDA

Adjournment