

Proposed Compact Outline for Phase I
[Proposed Maximum Length - Five Pages. Appendices Allowed.]

University: _____
Fiscal Year: _____

University Mission and Vision for the Next Five to Ten Years

What are you and what do you hope to become in the next five to ten years.

(Approximately 100 words)

Institutional Contributions to Specific State University System *Forward By Design* Strategic Benchmarks [Degree Production, Undergraduate Success and Progress Rates].

Targets for three years out [2010-11] will be established with each institution.

Degree Production		Undergraduate Success and Progress Rates	
Bachelor's		# Baccalaureate Degrees (Non-Hispanic Blacks)	
Master's		# Baccalaureate Degrees (Hispanics)	
Doctoral		6 -Year Success and Progress Rate* (FTICs)	
Medicine, Law, Veterinary, Dental, Pharmacy		4 -Year Success and Progress Rate* (AA Transfers)	
Targeted Degrees (Degree areas to be specified for each institution)		5 -Year Success and Progress Rate* (Other Fall-Entry Transfers)	

* Will include the percentage of the cohort that has graduated from the SUS or remains enrolled in good standing in the SUS. Universities may attach success and progress rates in an appendix for other cohorts that are selected based on characteristics of the institution's student body.

Enrollment Plans

Present current year FTE by level, by main campus and each other instructional location, with next year's planned growth at each location.

Other Primary University Goals and Metrics for Current Fiscal Year

*Present **three to five goals** on which university effort will be focused in the fiscal year. Describe each goal including whether the goal is new or continuing, the strategy for achieving, the metrics by which success will be measured, progress to date on these metrics, specific actions to be taken in this fiscal year, expected outcomes, and assumptions, including financial, upon which the projected outcomes are predicated. [Need to align with institutional strategic plan and System priorities.]*

Windows of Opportunity: *If the university has been presented with one or more unique opportunities that have not been included in prior plans but on which particular attention will be focused this fiscal year, it should be presented here. [It is recognized that not every university will have something in this category every year.]*

Other University Strategic Goals and Initiatives for Next Two to Five Years [Two or Three Goals.]

Briefly summarize two to three long term goals on which university effort will be focused during each of the next two years. [Need to align with institutional strategic plan and System priorities.]

All New Degree Programs [All Levels] to be Proposed to the University Board of Trustees in the Next Three Years

List the new degree programs, bachelors, masters, doctoral, and professional, planned to be presented to your UBOT within the next three years.

Budget [Operating Budget from Prior Fiscal Year – Format to Be Proposed By Council of Administrative and Financial Affairs (CAFA)] CAFA: Consider including a column for 2007-08 and a column for 2008-09 and column for basic projections for 2010-11 to capture financial assumptions upon which the projected outcomes are predicated.

Example Only

Compact for FY 08 – FY 09

IX. Budget

Operating Budget - Fiscal Year Ending August 31, 2007					
	FY 2006	FY 2006	FY 2007	Increases (Decreases)	
	Actual	Adjusted	Operating	From 2006 to 2007	
		Budget	Budget	Amount	Percent
Operating Revenues:					
Tuition and Fees	\$ 10,952,089	15,609,468	13,506,718	17,897,547	16.5%
Federal Sponsored Programs	54,099,960	49,297,581	59,429,098	10,615,14	20.6%
State Sponsored Programs	8,330,620	8,027,102	9,037,454	10,038,2	12.6%
Local and Private Sponsored Programs	2,045,483	2,064,507	2,240,283	175,776	8.5%
Net Sales and Services of Educational Activities	6,004,374	6,583,317	5,967,269	(591,048)	-9.6%
Net Sales and Services of Hospital and Clinics	-	-	-	-	-
Net Professional Fees	-	-	-	-	-
Net Auxiliary Enterprises	19,598,361	11,450,499	13,763,890	2,313,391	20.2%
Other Operating Revenues	1509,572	399,553	2,226,846	1,827,293	457.3%
Total Operating Revenues	166,940,459	193,006,737	225,771,592	32,764,855	17.0%
Operating Expenses:					
Instruction	87,547,509	92,637,869	104,936,324	12,298,455	13.3%
Academic Support	18,567,959	25,487,261	20,501,863	(4,685,398)	-18.6%
Research	18,322,683	15,780,562	23,481,587	7,711,025	48.9%
Public Service	15,202,765	14,210,255	15,124,987	914,732	6.4%
Hospitals and Clinics	-	-	-	-	-
Institutional Support	29,081,280	33,572,637	35,057,811	1485,174	4.4%
Student Services	18,251,482	23,196,624	24,870,274	1,673,650	7.2%
Operations and Maintenance of Plant	24,051,982	30,338,706	33,179,746	2,841,040	9.4%
Scholarships and Fellowships	22,932,211	15,319,977	21,725,186	5,412,19	41.9%
Auxiliary Enterprises	13,450,864	15,825,367	18,605,342	2,779,975	17.6%
Depreciation and Amortization	21,573,455	23,080,919	24,283,933	1,203,014	5.2%
Total Operating Expenses	269,992,160	289,144,177	321,777,063	32,632,896	11.9%
Operating Surplus/Deficit	(73,051,731)	(96,137,440)	(96,005,471)	13,195	-0.8%
Budgeted Nonoperating Revenues (Expenses):					
State Appropriations & HEAF	81,485,519	96,862,229	97,881,113	10,19,084	1.9%
Gifts in Support of Operations	3,716,024	2,116,687	3,425,804	1,284,117	60.0%
Net Investment Income	4,576,934	3,406,760	3,481,760	75,000	2.2%
Other Non-Operating Revenue	-	-	-	-	-
Other Non-Operating (Expenses)	-	-	-	-	-
Net Non-Operating Revenue/(Expenses)	89,778,477	102,405,676	104,788,677	2,376,201	2.3%
Transfers and Other:					
AUF Transfers Received	-	-	-	-	-
AUF Transfers (Made)	-	-	-	-	-
Transfers for Debt Service - Interest	(7,779,270)	(10,480,894)	(12,695,391)	(2,214,497)	21.8%
Total Transfers and Other	(7,779,270)	(10,480,894)	(12,695,391)	(2,214,497)	21.8%
Budget Margin (Deficit)	8,947,476	(4,207,658)	(3,911,985)	295,673	-7.0%
Reconciliation to Change in Net Assets:					
Net Non-Profit Health Corp Activity	-	-	-	-	-
Net Inc./Dec. in Fair Value of Investments	4,053,402	-	-	-	-
Interest Expense on Capital Asset Financings	-	-	-	-	-
Capital Approp. Gifts and Sponsored Programs	52,247	-	-	-	-
Additions to Permanent Endowments	1938,474	3,229,939	3,391,436	151497	5.0%
Transfers for Debt Service - Principal	(5,643,958)	(8,954,714)	(9,352,911)	(498,156)	5.6%
Reverse Transfers for Debt Service (System Only)	-	-	-	-	-
Transfers and Other	78,838,775	44,256,422	14,015,099	(30,241,323)	-58.3%
RECNA Change in Net Assets	\$ 87,864,16	34,419,989	4,161,640	(30,282,349)	-88.0%
Total Revenues and AUF Transfers	\$ 286,718,936	295,417,418	330,560,469	35,143,056	11.9%
Total Expenses (Including Transfers for Interest)	(277,771,460)	(289,625,071)	(334,472,454)	(34,847,383)	11.6%
Budget Margin (Deficit)	\$ 8,947,476	(4,207,658)	(3,911,985)	295,673	
Reconciliation to Use of Prior Year Balances					
Depreciation	-	23,080,919	24,283,933	-	-
Capital Outlay	-	(7,783,780)	(9,390,735)	-	-
Transfers for Debt Service - Principal	-	(8,954,714)	(9,352,911)	-	-
Budgeted Transfers	-	(763,100)	(459,800)	-	-
Use of Prior Year Balances		146,1667	118,703		

Contextual Data Summary [Last Four Years of Available Data]

Enrollments	Fall 2003	Fall 2004	Fall 2005	Fall 2006
Undergraduate Headcount				
Graduate/professional Headcount				
Total Enrollment				
Persistence (Cohort Size and Rate)	Year of Matriculation			
	Fall 2002	Fall 2003	Fall 2004	Fall 2005
Undergraduate First-Year Persistence				
Graduation Rates (From Same Institution) (Cohort Size and Rate)	Year of Matriculation			
	1998-99	1999-2000	2000-01	2001-02
6-Year Graduation Rate for FTICs				
4-Year Graduation Rate for AA Transfers				
5-Year Graduation Rate for Other Undergraduate Students				
Degree Production	2002-03	2003-04	2004-05	2005-06
Baccalaureate Degrees				
Master's Degrees				
Doctoral Degrees				
Professional Degrees				
Degree Production for Underrepresented Minority Groups	2002-03	2003-04	2004-05	2005-06
Black Non-Hispanic Baccalaureate Degrees as % of Total Baccalaureate Degrees				
Hispanic Baccalaureate Degrees as % of Total Baccalaureate Degrees				
Faculty, Staff, and Administration	2003-04	2004-05	2005-06	2006-07
Full-Time Tenured/Tenure-Track Faculty				
Multi-Year Contract Faculty (FGCU)				
Lecturer/Instructor/Clinical/Visiting Faculty				
Adjunct Faculty				
Graduate Student with Teaching Responsibility				
Graduate Student with Support Responsibility				
Administrative				
Other, Non-Faculty				
Other Graduate Student Employees				
Student/Faculty Ratio	Fall 2003	Fall 2004	Fall 2005	Fall 2006
FTE Student/Full-Time Tenured, Tenured-Earning Faculty Ratio				
Research Expenditures	2003-04	2004-05	2005-06	2006-07
Federally Financed Academic Research and Development Expenditures (Actual Dollars)				
Total Academic Research and Development Expenditures (Actual Dollars)				
Revenue	2003-04	2004-05	2005-06	2006-07
Revenue/FTE Student (Nearest Thousand)				
Endowments	As of:			
	8/31/2003	8/31/2004	8/31/2005	8/31/2006
Endowment Total Value				