

**SUS FUNDING MODEL**  
Charge Of This Workgroup by BOG  
For Model Parameters

- **Mission driven.**
- **Fair and equitable.**
- **Simple to understand; not overly complicated.**
- **Uses easily obtained data or data that has already been submitted to DOE.**
- **Flexible and easy to adjust during economic change.**

The slide has a dark background with a white line-art illustration of a group of people in the top right corner. A white arrow points from the left towards the right side of the slide. A small number '2' is visible in the bottom right corner of the slide.

## X SUS FUNDING MODEL

The Technical Advisory Group studied several different approaches to a variety of different models. We considered:

- A completely expenditure driven model
- A zero-based model approach
- And the proposed model which is enrollment driven and generates faculty and staff positions.

3

## X SUS FUNDING MODEL

- **Model Concept**
  - **Incremental enrollment growth based on enrollment plan.**
  - **Mission oriented through instructional productivity and research factors appropriate to institutional mission.**
  - **Cost of Living Adjustment component on Base Funding.**
  - **Generation of General Revenue and Lottery only. Student Fee revenue not part of the model.**

4

This slide features a dark background with a light-colored path leading towards the right. In the top right corner, there is a graphic of a globe with several location pins. A white 'X' is positioned in the top left corner. The title 'SUS FUNDING MODEL' is centered at the top in a large, bold, white font. Below the title, the subtitle 'Why Staff Driven Model Recommended?' is written in a smaller white font. A white arrow points from the subtitle towards the right. The main content consists of three bullet points, each starting with a white square symbol. The text is white and bold. A small white number '5' is located in the bottom right corner of the slide.

**SUS FUNDING MODEL**  
Why Staff Driven Model Recommended?

- **Focuses on meeting the needs of students by generating the resources necessary to serve our university students.**
- **Easy to adjust during periods of economic change by providing for individual components to be considered in the model.**
- **Provides funds for future student needs rather than on factors tied to inadequate prior funding.**

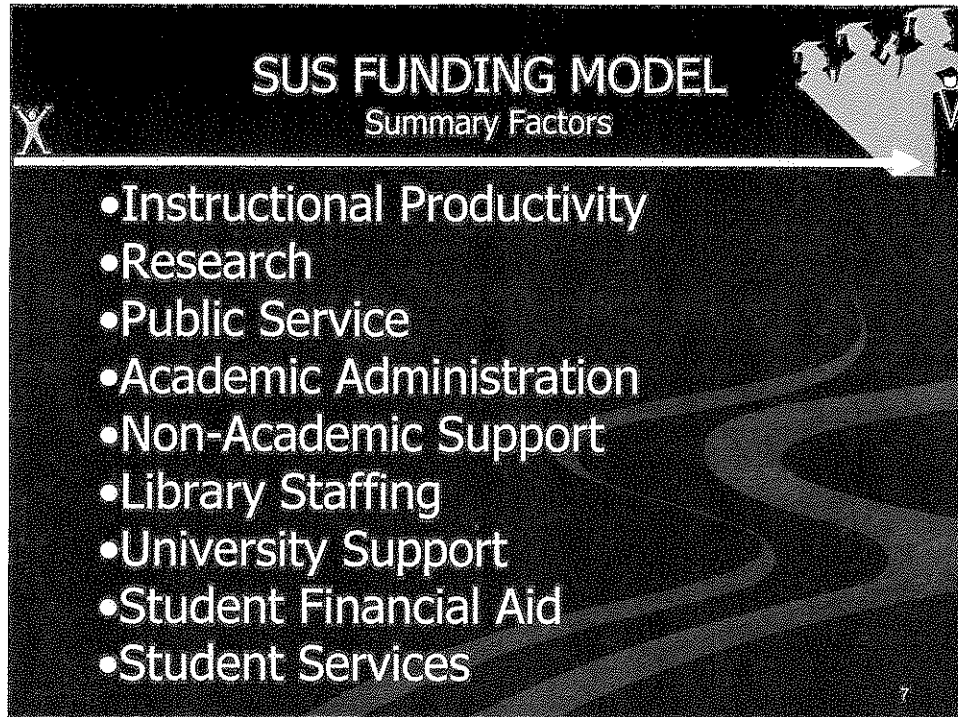
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**SUS FUNDING MODEL**  
Why Staff Driven Model Recommended? Cont.

- **Provides justifiable rationale for annual rate increases.**
- **Alleviates need to identify "specials" included in each university's base budget.**
- **Provides an equitable level of resources to similar institutions to provide a similar activity, service, based on the number of students served.**

6

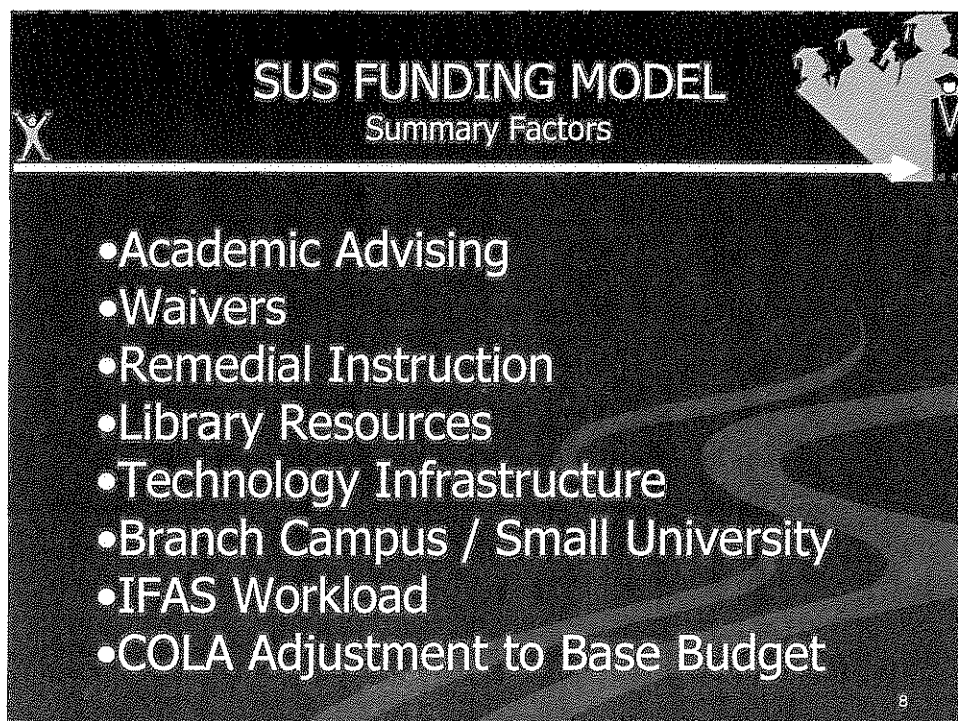


**SUS FUNDING MODEL**  
Summary Factors

- Instructional Productivity
- Research
- Public Service
- Academic Administration
- Non-Academic Support
- Library Staffing
- University Support
- Student Financial Aid
- Student Services

7

This slide features a dark background with a light-colored wavy pattern. At the top left is a small white 'X' icon, and at the top right is a small white graphic of a person in a graduation cap. The title 'SUS FUNDING MODEL' is in large white letters, with 'Summary Factors' below it in a smaller font. A white arrow points to the right from the top right corner. The list of factors is in white text, and the number '7' is in the bottom right corner.



**SUS FUNDING MODEL**  
Summary Factors

- Academic Advising
- Waivers
- Remedial Instruction
- Library Resources
- Technology Infrastructure
- Branch Campus / Small University
- IFAS Workload
- COLA Adjustment to Base Budget

8

This slide features a dark background with a light-colored wavy pattern. At the top left is a small white 'X' icon, and at the top right is a small white graphic of a person in a graduation cap. The title 'SUS FUNDING MODEL' is in large white letters, with 'Summary Factors' below it in a smaller font. A white arrow points to the right from the top right corner. The list of factors is in white text, and the number '8' is in the bottom right corner.



**SUS FUNDING MODEL**  
What GROUP Does My University Belong?

The Funding Formula Committee asked the Technical Advisory Group to consider removing the numerical titles of the groups and replacing the names with a narrative description.

9

**SUS FUNDING MODEL**

- **INSTRUCTIONAL PRODUCTIVITY**
  - **GROUP III**
    - Lower 1,039 SCH / 12 mo. FTE Fac. Pos.
    - Upper 732 SCH / 12 mo. FTE Fac. Pos.
    - Grad I 434 SCH / 12 mo. FTE Fac. Pos.
    - Grad II 266 SCH / 12 mo. FTE Fac. Pos.

10

**SUS FUNDING MODEL**

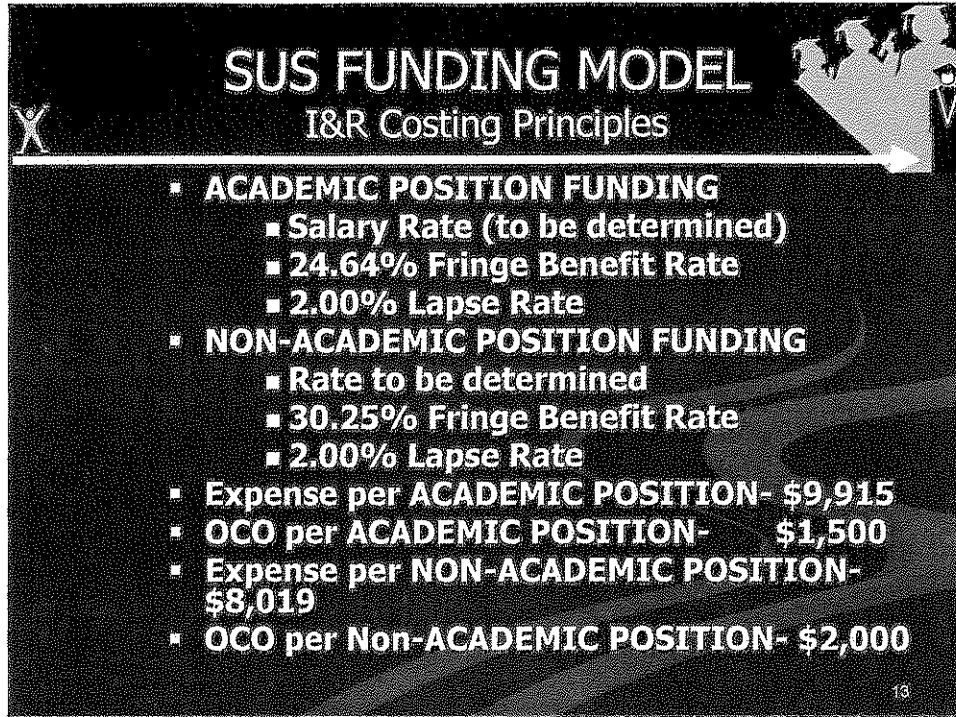
- **INSTRUCTIONAL PRODUCTIVITY**
  - **GROUP II**
    - Lower 1,092 SCH / 12 mo. FTE Fac. Pos.
    - Upper 881 SCH / 12 mo. FTE Fac. Pos.
    - Grad I 434 SCH / 12 mo. FTE Fac. Pos.
    - Grad II 266 SCH / 12 mo. FTE Fac. Pos.

11

**SUS FUNDING MODEL**

- **INSTRUCTIONAL PRODUCTIVITY**
  - **GROUP I**
    - Lower 1,145 SCH / 12 mo. FTE Fac. Pos.
    - Upper 881 SCH / 12 mo. FTE Fac. Pos.
    - Grad I 434 SCH / 12 mo. FTE Fac. Pos.
    - Grad II 266 SCH / 12 mo. FTE Fac. Pos.

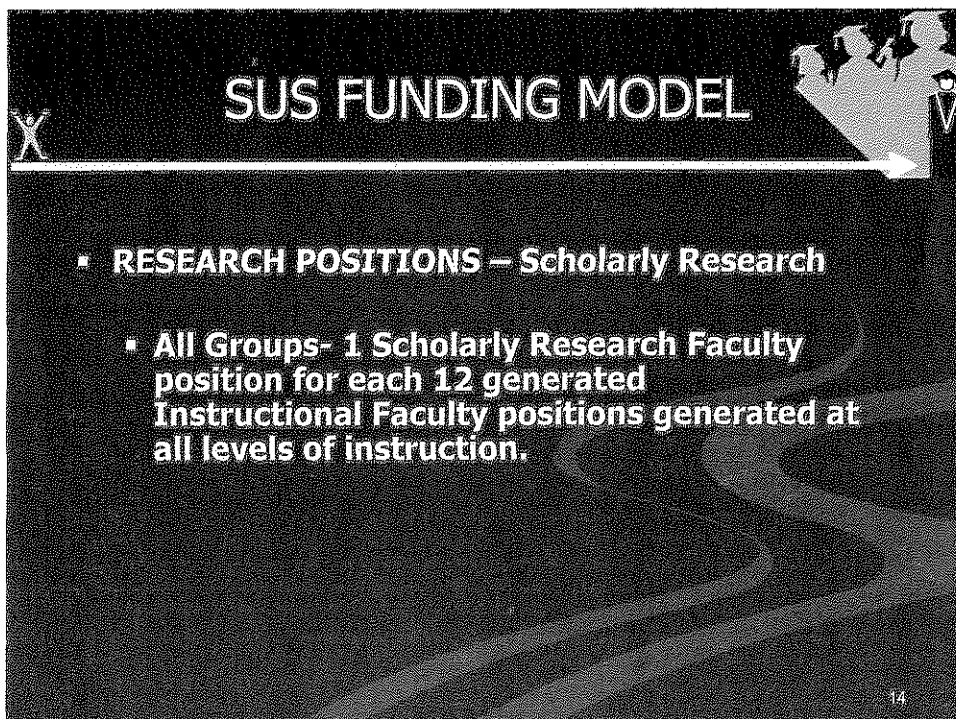
12



**SUS FUNDING MODEL**  
I&R Costing Principles

- **ACADEMIC POSITION FUNDING**
  - Salary Rate (to be determined)
  - 24.64% Fringe Benefit Rate
  - 2.00% Lapse Rate
- **NON-ACADEMIC POSITION FUNDING**
  - Rate to be determined
  - 30.25% Fringe Benefit Rate
  - 2.00% Lapse Rate
- Expense per **ACADEMIC POSITION**- \$9,915
- **OCO per ACADEMIC POSITION**- \$1,500
- Expense per **NON-ACADEMIC POSITION**- \$8,019
- **OCO per Non-ACADEMIC POSITION**- \$2,000

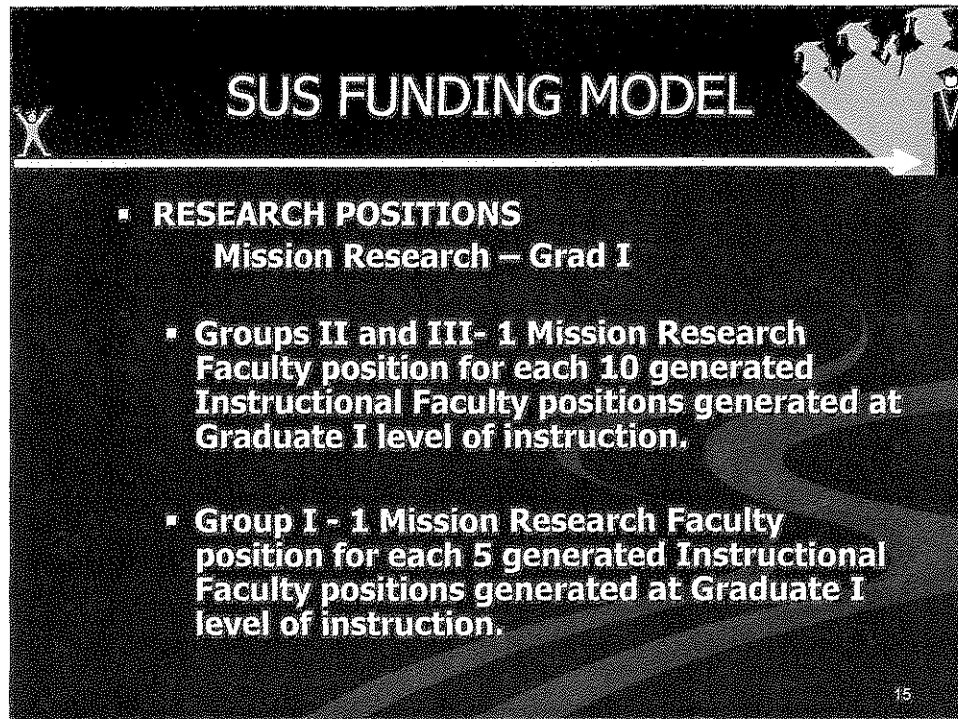
13



**SUS FUNDING MODEL**

- **RESEARCH POSITIONS – Scholarly Research**
  - All Groups- 1 Scholarly Research Faculty position for each 12 generated Instructional Faculty positions generated at all levels of instruction.

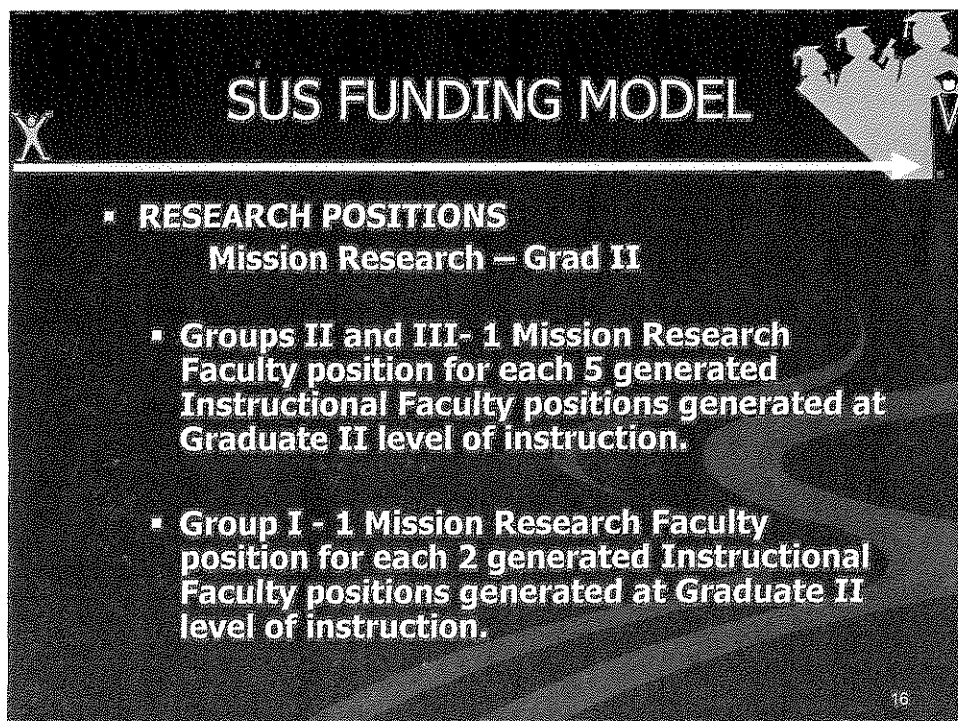
14



**SUS FUNDING MODEL**

- **RESEARCH POSITIONS**  
**Mission Research – Grad I**
  - **Groups II and III- 1 Mission Research Faculty position for each 10 generated Instructional Faculty positions generated at Graduate I level of instruction.**
  - **Group I - 1 Mission Research Faculty position for each 5 generated Instructional Faculty positions generated at Graduate I level of instruction.**

15



**SUS FUNDING MODEL**

- **RESEARCH POSITIONS**  
**Mission Research – Grad II**
  - **Groups II and III- 1 Mission Research Faculty position for each 5 generated Instructional Faculty positions generated at Graduate II level of instruction.**
  - **Group I - 1 Mission Research Faculty position for each 2 generated Instructional Faculty positions generated at Graduate II level of instruction.**

16



**SUS FUNDING MODEL**

**OTHER I&R GENERATED POSITIONS**

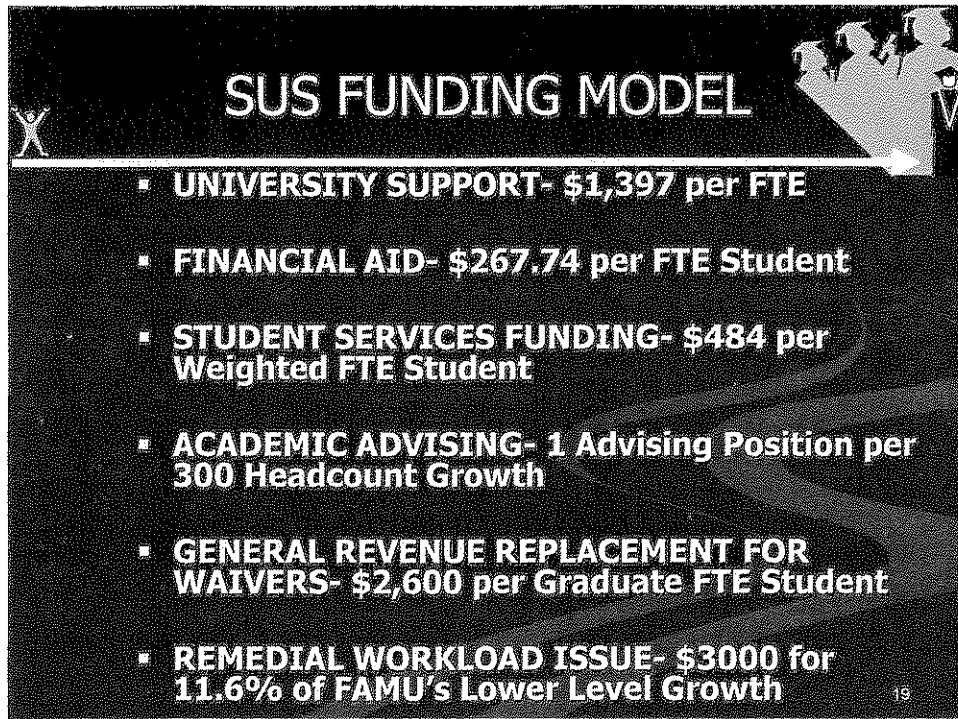
- **PUBLIC SERVICE FACULTY- 1 Position for each 50 Instructional Faculty Positions Generated.**
- **ACADEMIC ADMINISTRATION FACULTY- 1 Position for each 13 Faculty Positions Generated**
- **Academic Support Positions- 1 Position for each 3.0 Faculty Position Generated.**

17

**SUS FUNDING MODEL**

- **LIBRARY SUPPORT STAFF (FACULTY AND NON-FACULTY)**
  - **1 per 300 Lower FTE Students**
  - **1 per 150 Upper FTE Students**
  - **1 per 75 Grad I FTE Students**
  - **1 Per 50 Grad II FTE Students**

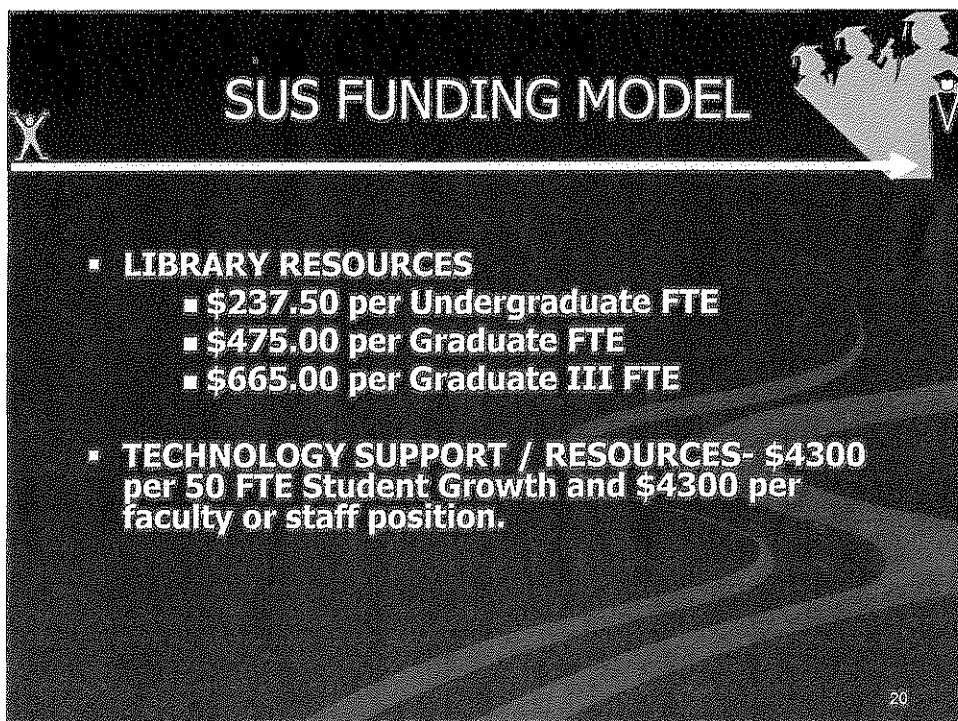
18



**SUS FUNDING MODEL**

- **UNIVERSITY SUPPORT-** \$1,397 per FTE
- **FINANCIAL AID-** \$267.74 per FTE Student
- **STUDENT SERVICES FUNDING-** \$484 per Weighted FTE Student
- **ACADEMIC ADVISING-** 1 Advising Position per 300 Headcount Growth
- **GENERAL REVENUE REPLACEMENT FOR WAIVERS-** \$2,600 per Graduate FTE Student
- **REMEDIAL WORKLOAD ISSUE-** \$3000 for 11.6% of FAMU's Lower Level Growth

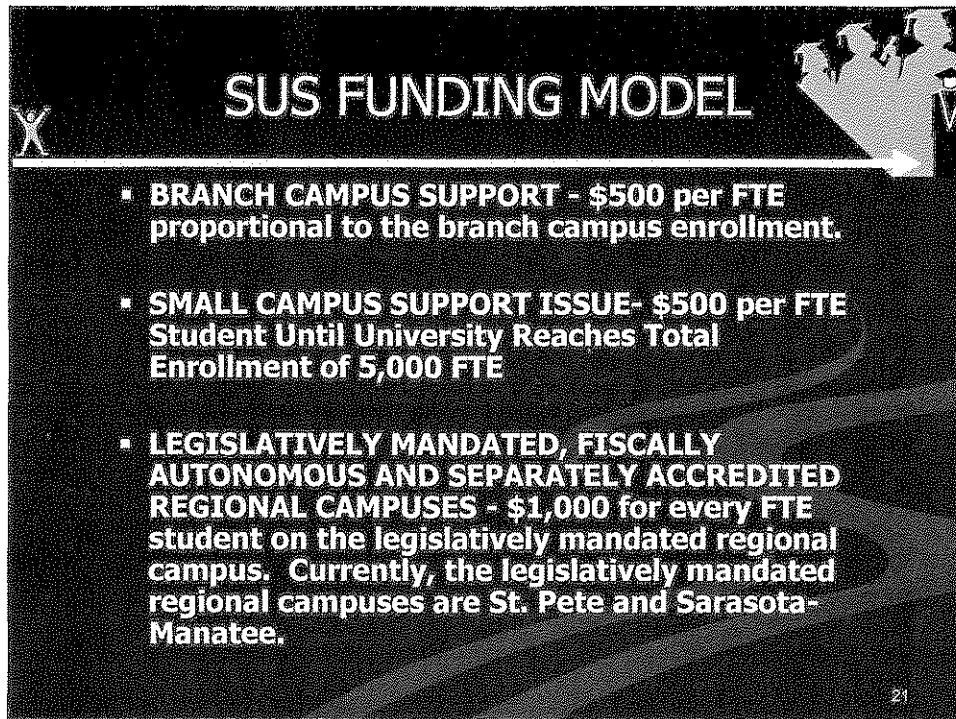
19



**SUS FUNDING MODEL**

- **LIBRARY RESOURCES**
  - \$237.50 per Undergraduate FTE
  - \$475.00 per Graduate FTE
  - \$665.00 per Graduate III FTE
- **TECHNOLOGY SUPPORT / RESOURCES-** \$4300 per 50 FTE Student Growth and \$4300 per faculty or staff position.

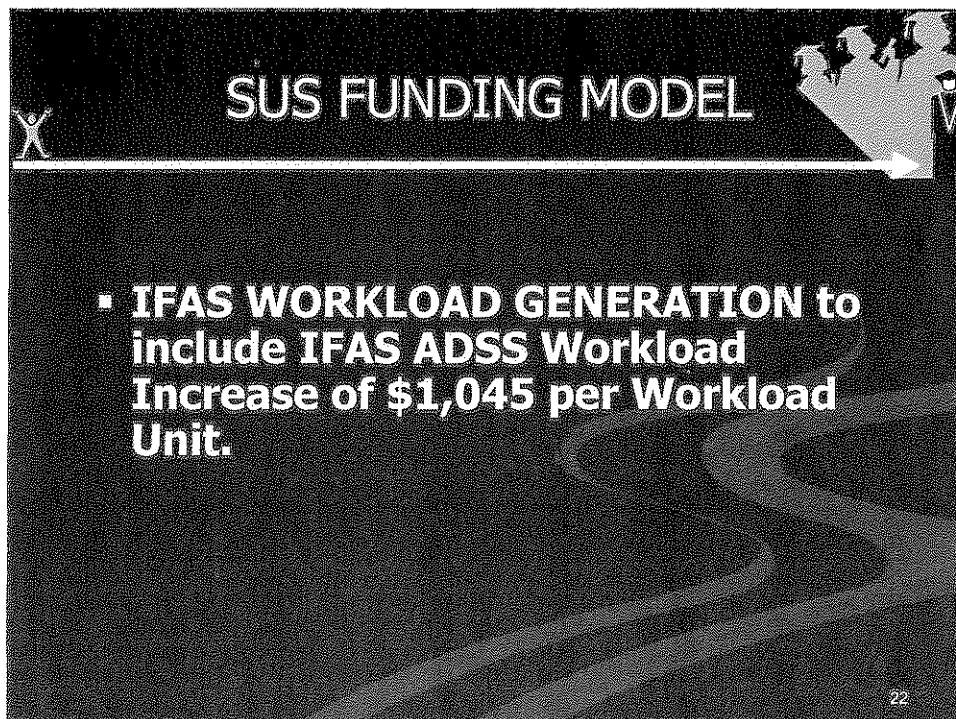
20



**SUS FUNDING MODEL**

- **BRANCH CAMPUS SUPPORT - \$500 per FTE proportional to the branch campus enrollment.**
- **SMALL CAMPUS SUPPORT ISSUE- \$500 per FTE Student Until University Reaches Total Enrollment of 5,000 FTE**
- **LEGISLATIVELY MANDATED, FISCALLY AUTONOMOUS AND SEPARATELY ACCREDITED REGIONAL CAMPUSES - \$1,000 for every FTE student on the legislatively mandated regional campus. Currently, the legislatively mandated regional campuses are St. Pete and Sarasota-Manatee.**

21



**SUS FUNDING MODEL**

- **IFAS WORKLOAD GENERATION to include IFAS ADSS Workload Increase of \$1,045 per Workload Unit.**

22

## SUS FUNDING MODEL

**USF, UF, and FSU GRADUATE III Generation  
(\$29,900 MD and \$20,000 DMD and DVM for Growth  
GR)**

**The \$29,900 represents the 2003-04 state  
appropriations for University of Miami medical  
students.**

**The \$20,000 for DMD and DVM represents the  
amount currently expended for these students less  
Incidental Revenues.**

**USF (540) and UF (800) Residents Generation  
(\$29,900 for Growth GR)**

23

## SUS FUNDING MODEL ADJUSTMENT FOR FEES

The Technical Advisory Group recommends that the Legislature pay 75% of the cost of the enrollment growth portion of the model. The enrollment growth portion of the model has been adjusted to reflect only 75% of the costs being requested from state funds.

24



**SUS FUNDING MODEL**  
Base Budget Adjustment

**COLA ADJUSTMENT ON BASE GR and Lottery BUDGET- TAG Recommended 2.52% of base with the base to be determined based on status if administered funds appropriated by Legislature.**

25

**SUS FUNDING MODEL**  
Summary

1. Mission driven – Mission is recognized throughout the model, especially in the instructional and research components of the model. It is also reflected in the branch campus/small university factor, remedial factor and in the library resource components of the model.
2. Fair and equitable – Provides comparable resources to institutions with similar missions and specifically addresses the unique needs of certain institutions.

26

## SUS FUNDING MODEL Summary (Cont.)

3. Simple to understand; not overly complicated – The model has a relatively small number of simple building blocks. In general, the incremental enrollment request will be the major change in the model from year to year. Also, some of the factors will need to be updated to account for the effect of inflation and other issues. To further simplify the operations of the model, key decision making points are highlighted within the model.

27

## SUS FUNDING MODEL Summary (Cont.)


4. Uses easily obtained data or data that has already been submitted to DOE –The model heavily uses the expenditure analysis and other existing and easily obtainable data.
5. Flexible and easy to adjust during economic change – The model has been built to offer the maximum flexibility. The factors can be altered based on a certain percentage of the formula that may be desired or each component can be individually altered.

28

**X**

## SUS FUNDING MODEL


### Unfinished Issues



1. Assign institutions in groups for instructional and research purposes.
2. Develop separate instructional factors for NCF.
3. Determine most appropriate faculty and staff salary averages to be used in formula.

29

## 2004 SUS FUNDING MODEL QUESTIONS and ANSWERS



30