

**SUMMARY OF UNIVERSITY RECOMMENDATIONS  
FUNDING FORMULA MODEL  
OCTOBER 20, 2003**

UNIV	RECOMMENDATIONS
USF	<ul style="list-style-type: none"> <li>• <b>9 Characteristics of funding formula</b> <ul style="list-style-type: none"> <li>• Responsive to each unique mission, geographical location, size, academic characteristics, support statewide priorities</li> <li>• Fair, rational, equitable based upon current, consistently reported data</li> <li>• Transparent, simple to understand</li> <li>• Ensure adequate, stable funding base to support/maintain excellence in higher education</li> <li>• Agile to fluctuations in economic climate, adaptable to changing conditions in higher education funding</li> <li>• Provide for increased devolution of authority &amp; growing institutional autonomy (UBOTS determine appropriateness of university missions &amp; tuition/fees)</li> <li>• Reward institutional performance/productivity aligned to Statewide K-20 policies &amp; priorities</li> <li>• Support a more diversified funding portfolio</li> <li>• Recognize the importance of implementing &amp; maintaining state-of-the-art technology support for nationally competitive academic programs &amp; improved administrative efficiency</li> </ul> </li>   <li>• <b>Public Appropriations:</b> <ul style="list-style-type: none"> <li>• Can't be driven primarily by student FTE;</li> <li>• Must take into account volume, quality, mix of research undertaken &amp; range/level of Academic programs delivered</li> <li>• Enrollment growth-funding maintained or universities "bid" for student capacity</li> <li>• Relationship of fixed/variable costs using student FTE &amp;/or headcount needs to be carefully examined</li> <li>• Support multi-year block grant funding driven by measurable outcome</li> <li>• Reconsider calculation of student FTE along with undergraduate requirement to enroll in Summer School</li> <li>• Permit carry-forward GR funds without penalty &amp; free of threat to future appropriations</li> <li>• Balance between &amp; future dependency on GR, Lottery, PECO</li> <li>• GR/Lottery must be stabilized even as tuition/fees increase</li> <li>• Incentives to encourage universities to respond to workforce priority needs</li> </ul> </li>   <li>• <b>Tuition:</b> <ul style="list-style-type: none"> <li>• Full flexibility to UBOTs to price student tuition</li> <li>• Freedom to introduce block tuition</li> <li>• Freedom to introduce differential tuition</li> <li>• Consideration of alternative tuition collection models</li> <li>• Decouple Bright Futures &amp; Florida Pre-Paid Tuition</li> </ul> </li>   <li>• <b>Fees:</b> <ul style="list-style-type: none"> <li>• Full flexibility to UBOTs</li> <li>• Recognition of unique circumstances (&amp; stages if development) across a diverse, 11 university system</li> </ul> </li>   <li>• <b>Financial Aid:</b> <ul style="list-style-type: none"> <li>• Florida must increase its level of need-based support for access goals while maintaining merit-based programs</li> </ul> </li>   <li>• <b>Research:</b> <ul style="list-style-type: none"> <li>• Statewide support should include funding for research infrastructure, basic research, &amp; training of new researchers which will help leverage broader investment in research</li> </ul> </li>   <li>• <b>Public Service &amp; Outreach</b> <ul style="list-style-type: none"> <li>• Support &amp; reward such initiatives which contribute to the public good</li> <li>• Possibly increase allowable indirect cost recovery rates</li> </ul> </li>   <li>• <b>Auxiliaries:</b> <ul style="list-style-type: none"> <li>• Full flexibility &amp; local control</li> </ul> </li>   <li>• <b>Private Giving:</b> <ul style="list-style-type: none"> <li>• Fullest local flexibility in building endowments</li> <li>• State must recommit to its "matching gifts" programs</li> <li>• State should consider tax incentives to promote individual &amp; corporate giving to SUS institutions</li> </ul> </li>   <li>• <b>Public-Private Partnerships:</b> <ul style="list-style-type: none"> <li>• Flexibility &amp; incentives to encourage private investment in a university's instructional delivery, research</li> </ul> </li> </ul>

