



**BOARD of GOVERNORS**  
**State University System of Florida**

**Budget & Finance Committee**  
**Tom Kuntz, Chair**

Tim Jones, Chief Financial Officer  
September 12, 2013

[www.flbog.edu](http://www.flbog.edu)



**SUS & Board**  
**2013-2014**  
**Operating Budgets**

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## SUS 2013-2014 Operating Budget

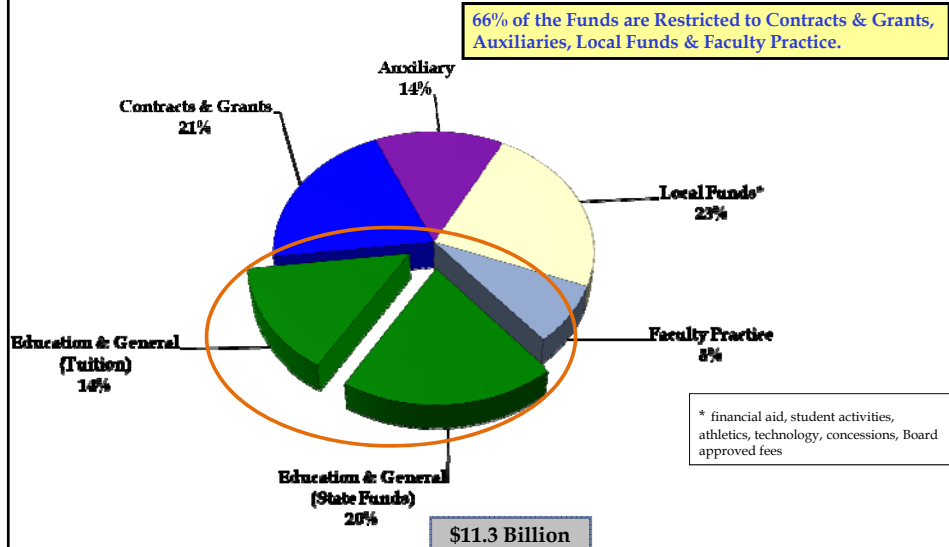
- Each Board of Trustees prepares and adopts a budget.
- Budgets conform to statute and Regulation 9.007.
- Universities indicate compliance with maintaining a 5% reserve.

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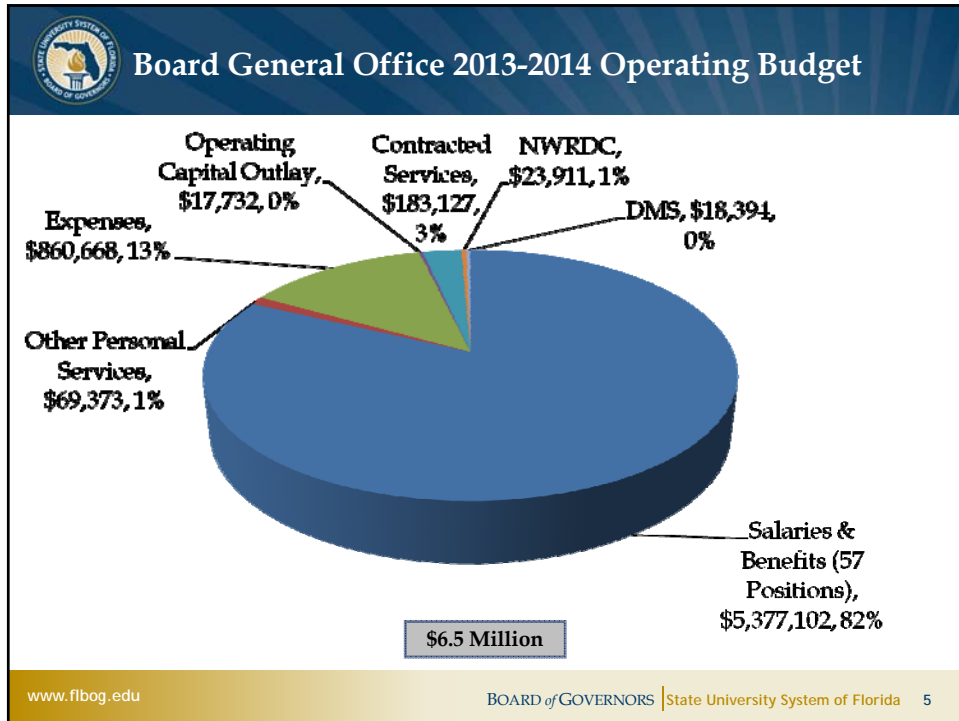


## SUS 2013-2014 Operating Budget Estimated Revenues



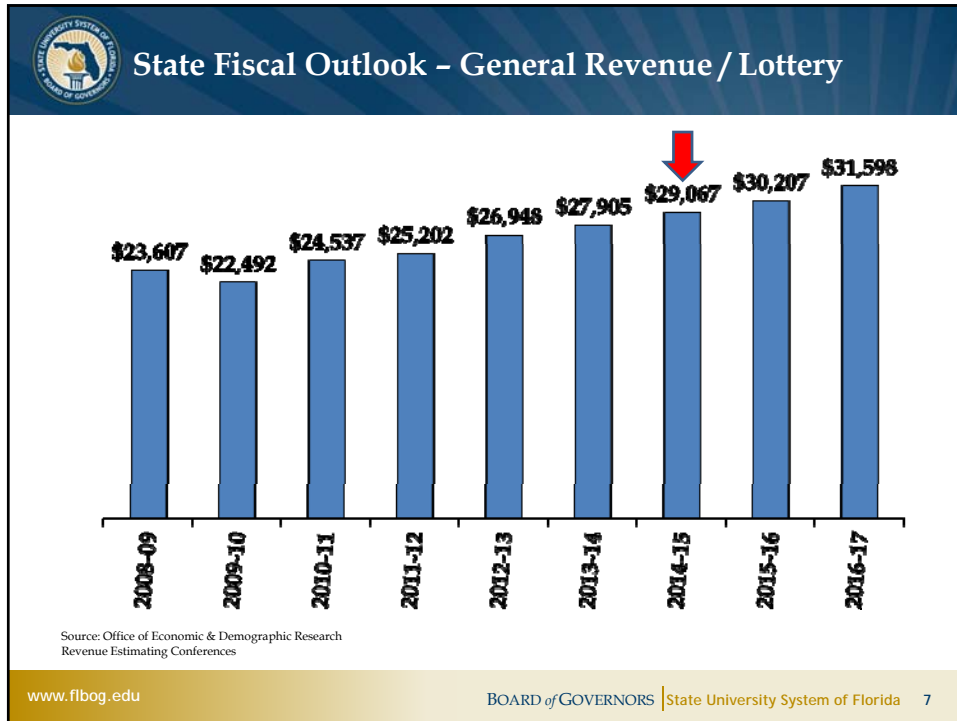
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**State Fiscal Outlook**

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 **Legislative 3-year Financial Outlook - 2014-2015  
General Revenue Outlook Projection**

- No general revenue budget gap for 2014-2015.
- \$845.7 M available for roll over into 2015-2016.

2014-2015 Projection (in millions)	Total
Available General Revenue	\$29,277.2
Base Budget	26,353.1
Tnsfr to Budget Stabilization Fund	214.5
Critical Needs	408.2
High Priority Needs	455.7
Reserve	1,000.0
Total Expenditures	\$28,431.5
Balance	\$845.7

Source: Office of Economic & Demographic Research  
Long-Range Financial Outlook – FY 2014-2015 through 2016-2017

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## 3-year Financial Outlook – SUS Funding Issues

- Florida Virtual Campus (FLVC)
- Medical School Final Phase-in for FIU and UCF
- Plant Operations & Maintenance for New Facilities
- UF-IFAS Workload
- Expected Increase in Tuition Revenue

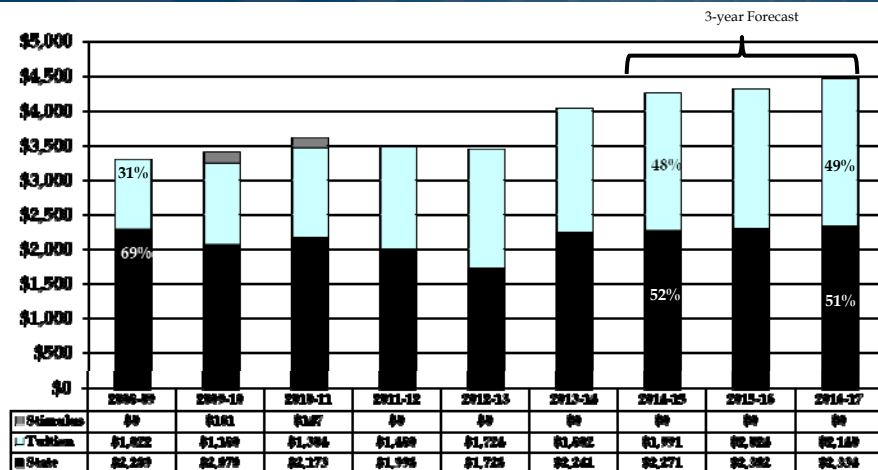
Source: Office of Economic & Demographic Research  
Long-Range Financial Outlook – FY 2014-2015 through 2016-2017

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## SUS Appropriated Operating Funds & 3-year Financial Outlook (GR and Lottery)



Source: Office of Economic & Demographic Research  
Long-Range Financial Outlook – FY 2014-2015 through 2016-2017

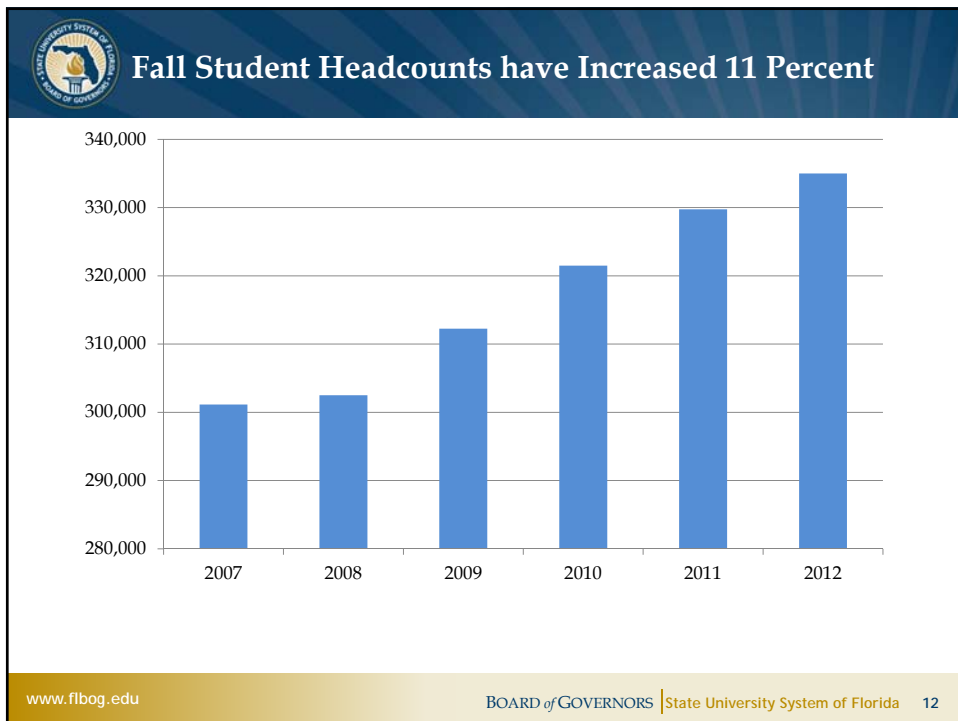
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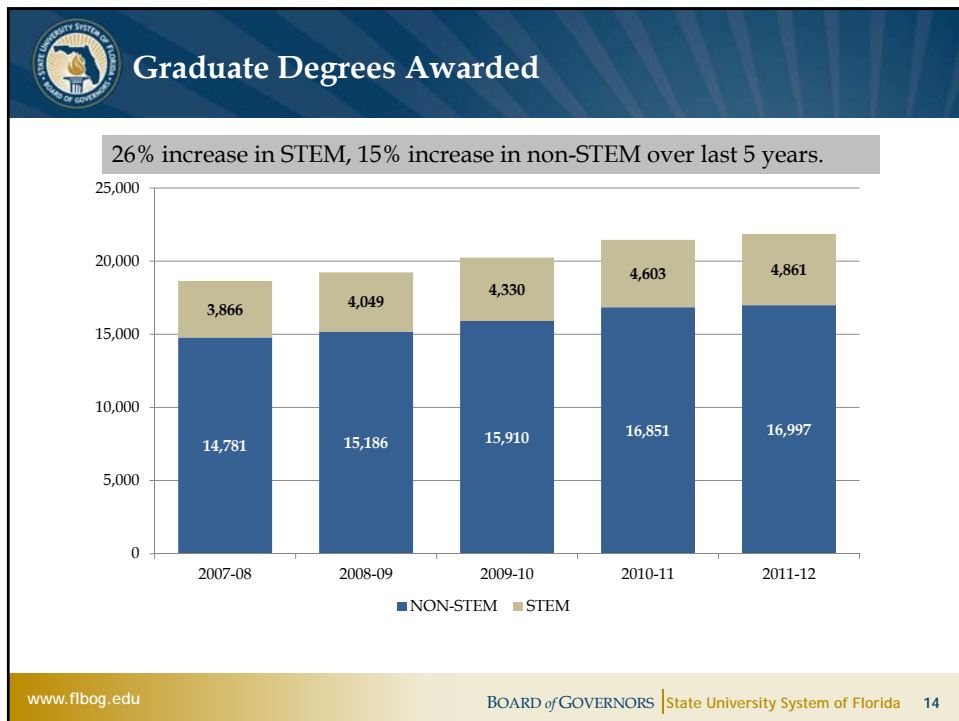
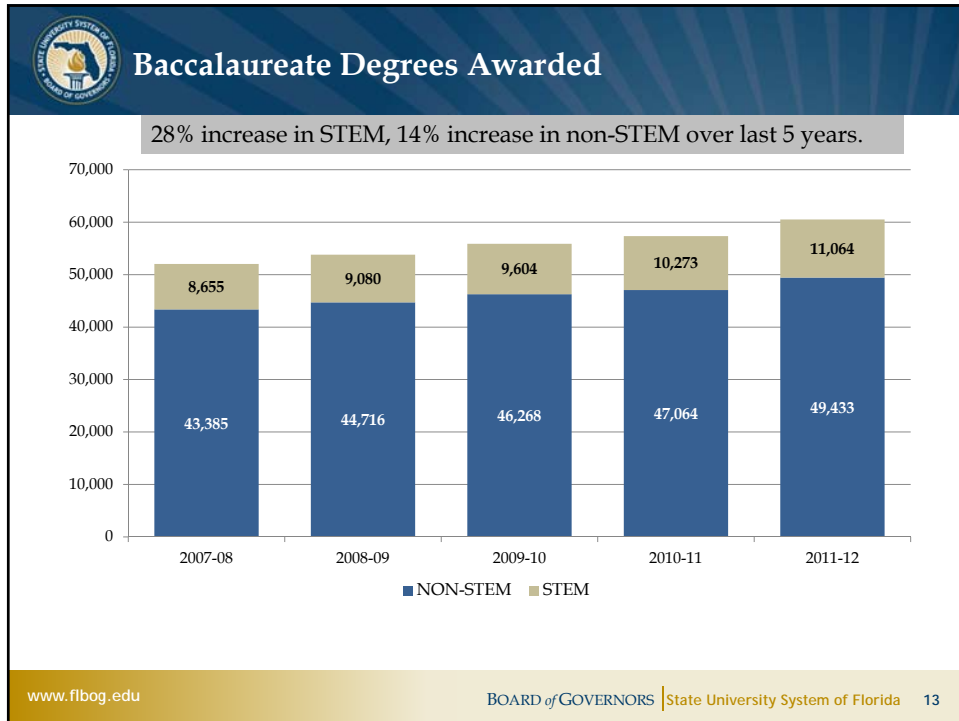
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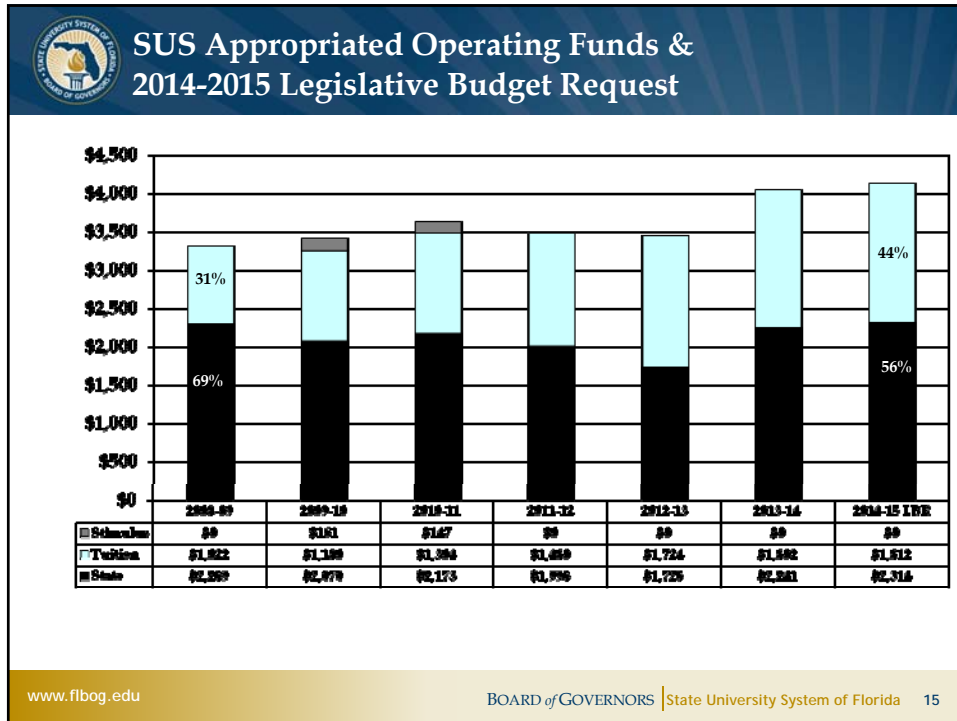
# FY 2014-2015 Legislative Budget Request


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 **Investments in the SUS**

Appropriation Category	2013-2014 Recurring Appropriation	2014-2015 Budget Request	2014-2015 \$ and % Change	
E&G Core Budget	\$3,447,107,055	\$3,516,493,395	\$69,386,340	2.0%
UF-IFAS	\$142,497,123	\$145,210,963	\$2,713,840	1.9%
UF-HSC	\$144,494,710	\$145,503,223	\$1,008,513	0.7%
USF-HSC	\$126,170,002	\$127,775,072	\$1,605,070	1.3%
FSU-MS	\$45,993,039	\$45,993,039	\$0	-----
FIU-MS	\$41,941,589	\$45,135,069	\$3,193,480	7.6%
UCF-MS	\$35,005,094	\$37,309,076	\$2,303,982	6.6%
FAU-MS	\$20,321,904	\$22,372,029	\$2,050,125	10.1%
E&G/Special Units	\$4,003,530,516	\$4,085,791,866	\$82,261,350	2.1%

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## Investments in the SUS

Appropriation Category	2013-2014 Recurring Appropriation	2014-2015 Budget Request	2014-2015 \$ and % Change	
E&G/Special Units	\$4,003,530,516	\$4,085,791,866	\$82,261,350	2.1%
Florida Virtual Campus	\$11,307,684	\$13,310,184	\$2,002,500	17.7%
Risk Mgmt. Ins.	\$20,220,780	\$20,220,780	\$0	-----
Student Fin. Asst.	\$7,140,378	\$7,140,378	\$0	-----
Grand Total	\$4,042,199,358	\$4,126,463,208	\$84,263,850	2.1%

\*Institute of Human & Machine Cognition

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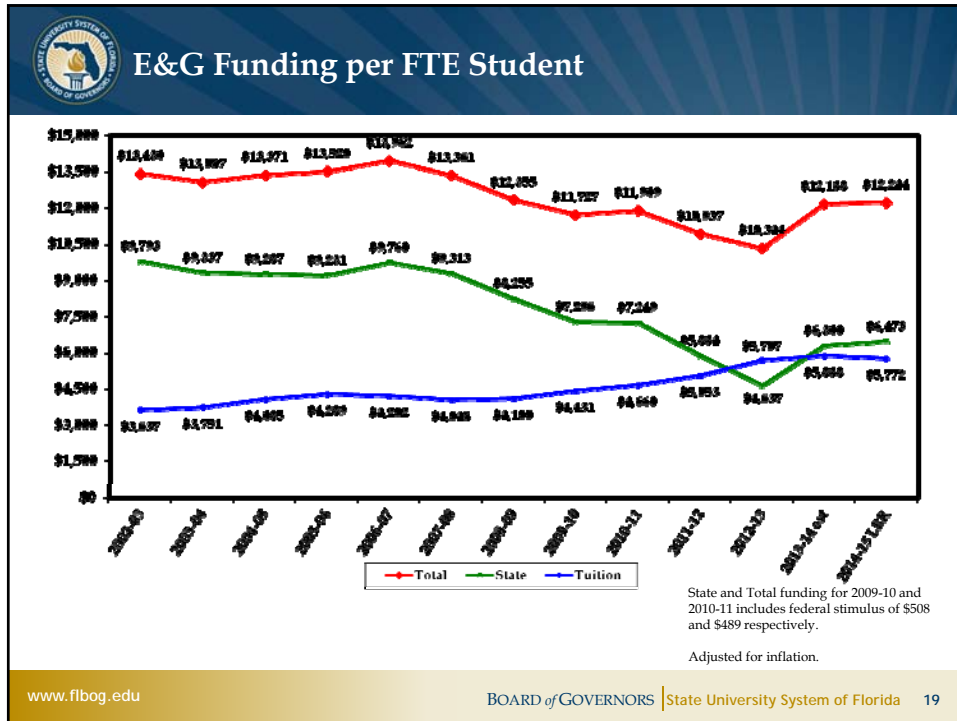
## Other LBR Pass-Through Initiatives

Appropriation Category	2013-2014 Recurring Appropriation	2014-2015 Budget Request	2014-2015 \$ and % Change	
Moffitt Cancer Ctr.	\$10,576,930	\$19,900,000	\$9,323,070	88%
IHMC	\$2,739,184	\$3,700,000	\$960,816	35%
Total	\$13,316,114	\$23,600,000	\$10,283,886	100%+

\*Institute of Human & Machine Cognition

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 **Three Strategic Areas Requested for Funding**

- Performance Funding - \$50 M
- Workload/Phase-In Initiatives - \$17 M
- Research / System Initiatives - \$16 M

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## Performance Funding – Primary Driver

### Performance Funding - \$50 M



- Guided by four principles:
  - Metrics that align with the SUS Strategic Plan goals;
  - Reward excellence or improvement;
  - Have a few clear, simple metrics, and;
  - Acknowledge the unique mission of the different institutions.
- \$50 M allocated based on 10 approved metrics:
  - Support initiatives most critical to the students and the state.



## Other Key Initiatives of the LBR

### Workload/Phase-in Initiatives - \$17 M

- Plant Operations & Maintenance - \$14.5 M
- FIU/UCF Medical School Implementation - \$663,994
  - Final year for implementation funding
- UF-IFAS Workload - \$2 M



## Other Key Initiatives of the LBR

### Research and System Initiatives - \$16 M

- Sunshine State Education and Research Computing Alliance (SSERCA) - \$5.7 M
- Florida Virtual Campus - \$2 M
- Shared Library Collection and Interim Storage Facility - \$1.1 M
- Florida Institute of Oceanography - \$2 M
- University Press of Florida - \$690,074
- SUS E-Journals - \$4.9 M



## LBR Pass-through Initiatives - \$23.6 M

- Moffitt Cancer Center - \$19.9 M



- Institute for Human and Machine Cognition - \$3.7 M





## Major Gifts Matching Endowment Program

### Major Gift Matching Endowment Program - \$284 M Johnson Scholarship Matching Program \$1.5 M

#### Total Endowments Created - 4,310

- Chairs - 327
- Scholarships, Professorships, Research - 3,983

#### Total Endowment Corpus - \$1.5 B

- Private Donations - \$1.1 B
- State Matching Received - \$407 M
- State Matching Pending - \$284 M



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## University Requests to Restore Non-recurring Initiatives - \$5.6 M

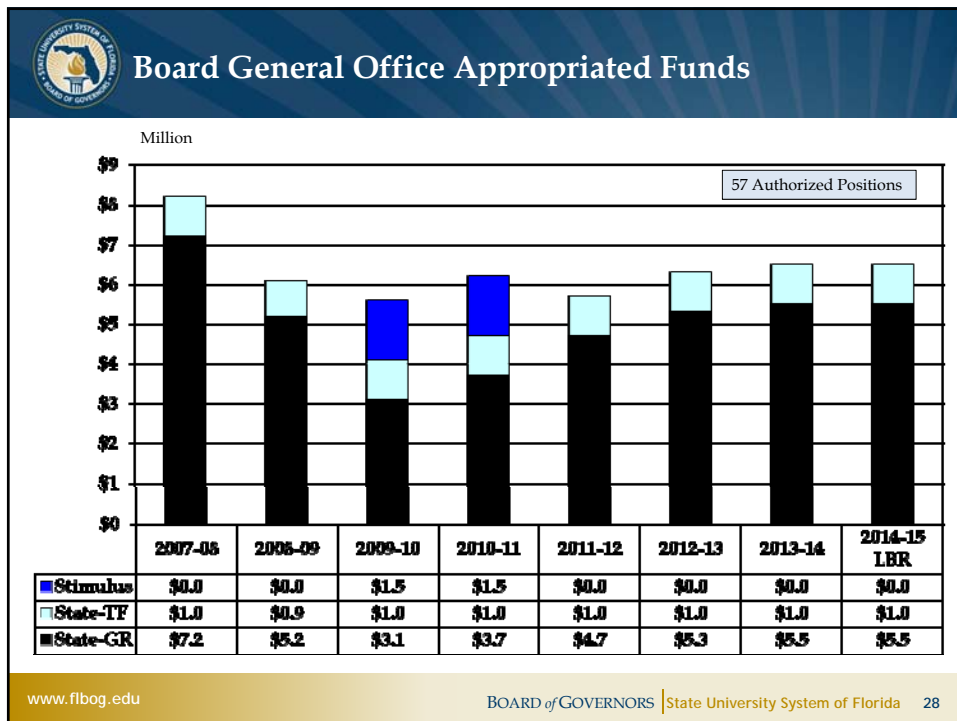
➤ UWF - Complete Florida	\$2 M
➤ FIU - Panther Life	\$300,000
➤ FSU - Health Equity Research Institute	\$400,000
➤ USF - Dozier School for Boys	\$190,000
➤ USF Sarasota/Manatee STEM Initiative	\$882,604
➤ USF-St. Pete - Family Student Center	\$131,000
➤ FAU-MS - Medical Simulation Center	\$500,000
➤ USF-HSC - Alzheimer's Research - Mayo	\$1.25 M


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 <b>2014-2015 Board General Office LBR</b>				
Appropriation Category	2013-2014 Total Appropriation	2014-2015 Budget Request	2014-2015 \$ and % Change	
Salary & Benefits	\$5,377,102	\$5,377,102	\$0	0%
OPS	\$69,373	\$69,373	\$0	0%
Expenses	\$860,668	\$841,858	(\$18,810)	(2%)
OCO	\$17,732	\$17,732	\$0	0%
Contracted Services	\$183,127	\$183,127	\$0	0%
NW Reg. Data Center	\$23,911	\$23,911	\$0	0%
TR DMS Contract	\$18,394	\$18,394	\$0	0%
<b>Total</b>	<b>\$6,550,307</b>	<b>\$6,531,497</b>	<b>(\$18,810)</b>	<b>(.3%)</b>
General Revenue	\$5,566,682	\$5,547,872	(\$18,810)	(.5%)
Trust Funds	\$983,625	\$983,625	\$0	0%
Positions	57	57	0	0%


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# Performance Funding Model

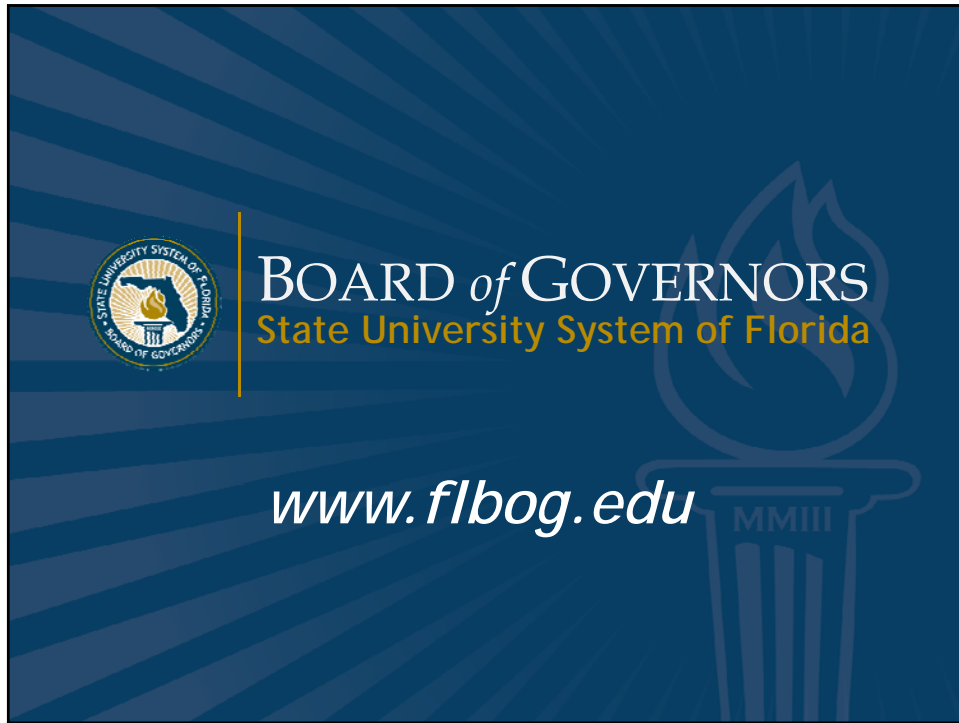
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## Performance Funding Model (September 11, 2013)

Points	EXCELLENCE (Achieving System Goals)			IMPROVEMENT (Recognizing Annual Improvement)			
	3	2	1	3	2	1	
<b>Key Metrics Common to All Universities Plus 2 Institution Specific Metrics</b>							
1	Percent of Bachelor's Graduates Employed and/or Continuing their Education Further 1 Yr after Graduation	75%	65%	55%	3%	2%	1%
2	Median Average Full-time Wages of Undergraduates Employed in Florida 1 Yr after Graduation	\$40,000	\$30,000	\$20,000	3%	2%	1%
3	Average Cost per Undergraduate Degree to the Institution	\$20,000	\$25,000	\$30,000	3%	2%	1%
4	Six Year Graduation Rate <i>Full-time and Part-time FTIC</i>	70%	65%	60%	3%	2%	1%
5	Academic Progress Rate 2nd Year Retention with GPA Above 2.0	90%	85%	80%	3%	2%	1%
6	Bachelor's Degrees Awarded in Areas of Strategic Emphasis (includes STEM)	50%	40%	30%	3%	2%	1%
7	University Access Rate Percent of Undergraduates with a Pell-grant	75%	70%	65%	3%	2%	1%
8	Master's Degrees Awarded in Areas of Strategic Emphasis (includes STEM)	50%	40%	30%	3%	2%	1%
<b>Institution-Specific Metrics</b>							
9	Board of Governors choice	TBD	TBD	TBD	TBD	TBD	TBD
10	UBOTs choice	TBD	TBD	TBD	TBD	TBD	TBD

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## Florida Institute of Oceanography *Study Abroad Summer Course: Field Studies in Marine Science*



**Courtney Hackney, Ph.D., UNF**

**Board of Governors,  
Academic and Student Affairs Committee Meeting  
New College of Florida, Sarasota, September 12<sup>th</sup>, 2013**



### Week 1: Overview of Oceans and Coastal Processes



<http://fiofieldstudies2013.blogspot.com/>



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SOUTH FLORIDA  
ST. PETERSBURG

### Week 2: Sampling the Ocean






FLORIDA  
GULF COAST  
UNIVERSITY


### Week 3: Tropical Estuaries and Mangroves











**FLORIDA ATLANTIC  
UNIVERSITY**

**Week 4: Tropical Reefs  
and Seagrasses**



**KML**  
Key West Marine Lab, Florida Keys



**UNF**  
UNIVERSITY of  
NORTH FLORIDA

**Week 5: Temporal and Spatial Variability in Coastal Waters**









## Summer Course Logistics and Hurdles

- **Logistics:**
  - Housing, cafeteria and parking major issues.
  - Two locations did not have cafeterias and students did their own cooking.
- **Administrative Hurdles:**
  - Non-traditional timing.
  - Syllabi requirements varied among universities.
  - Special accounts needed to be established.
  - Grading metrics had to be standardized.



## Summer Course Lessons Learned and Student Feedback

- **Lessons Learned:**
  - Engage advisors early in the school year.
  - Students need to understand how this class fits into their degree program.
  - Class size is likely 16 maximum.
  - Ideal student is a rising Junior.
  - Graduate Teaching Assistant traveling with each cohort is key to success.
  - A committed lead instructor at each university.
  - Ideally, three faculty at each institution.
  - On-line reading materials available on Friday for the next week's topics.
- **Student Feedback:**
  - Comingling students from different universities and programs was useful.
  - Personal contact and conversations with faculty helped them decide what they wanted to do and what would be necessary to get there.
  - Would recommend course to all fellow students.



## FIO Mission: Support Marine Science Education and Research

- FIO Courses in 2014:
  - Summer Course planning underway, including teachers course
  - Winter Course in discussion
- State-supported ship time (SUS Days)
  - Competitive process awarded to SUS faculty.
  - Students are given the opportunity to experience working on a research vessel (primarily R/V Bellows).
- R/V Bellows has 3-4 years life remaining and needs to be replaced




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**USF** UNIVERSITY OF  
SOUTH FLORIDA

## Questions?



<http://fio.usf.edu>

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# BOARD of GOVERNORS

## State University System of Florida

### University Work Plans: Systemic Issues

Dr. Jan Ignash, Vice Chancellor, Academic and Student Affairs  
September 12, 2013

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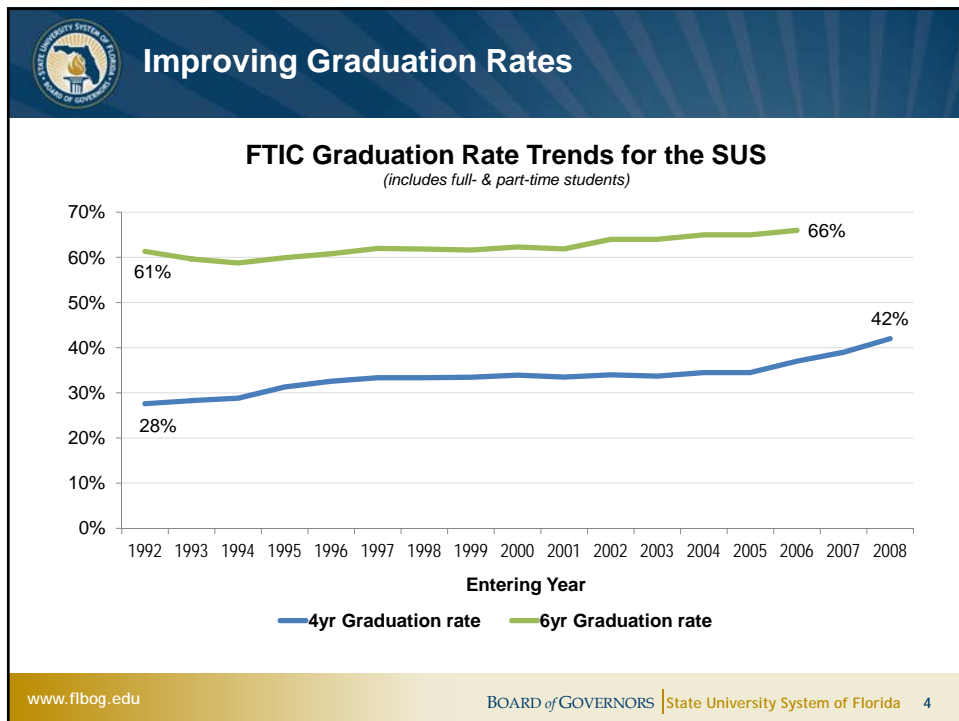
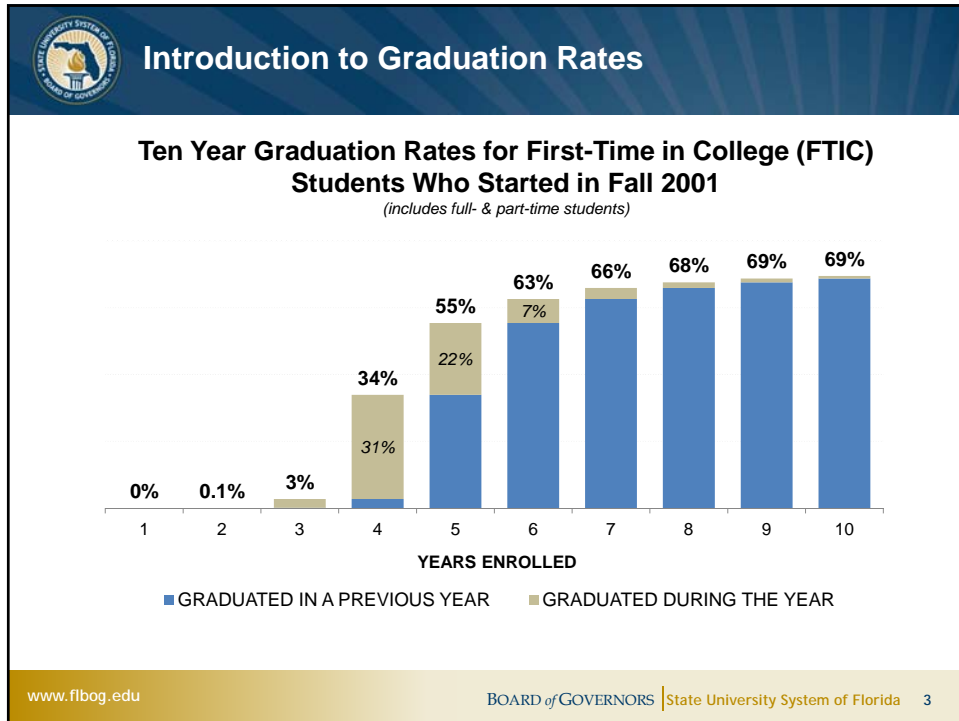


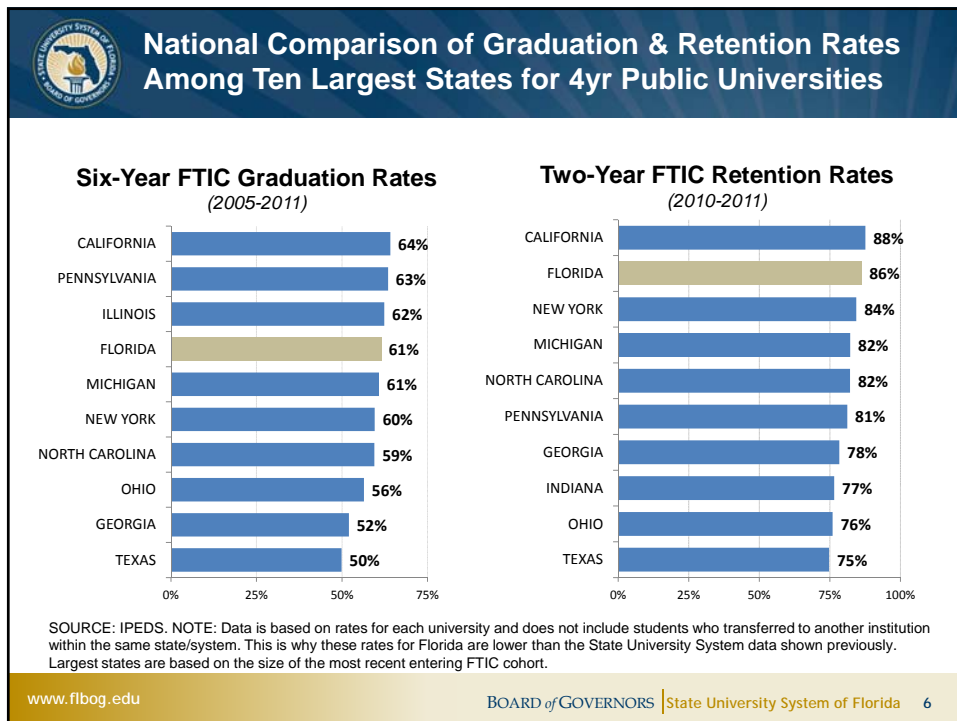
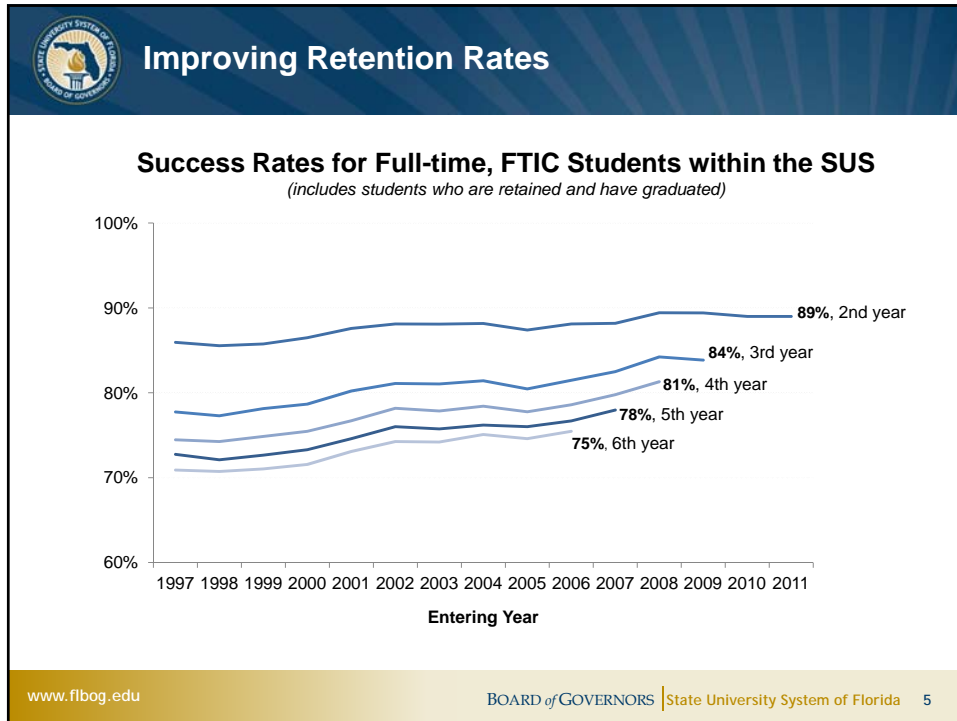
### Work Plan Systemic Issues

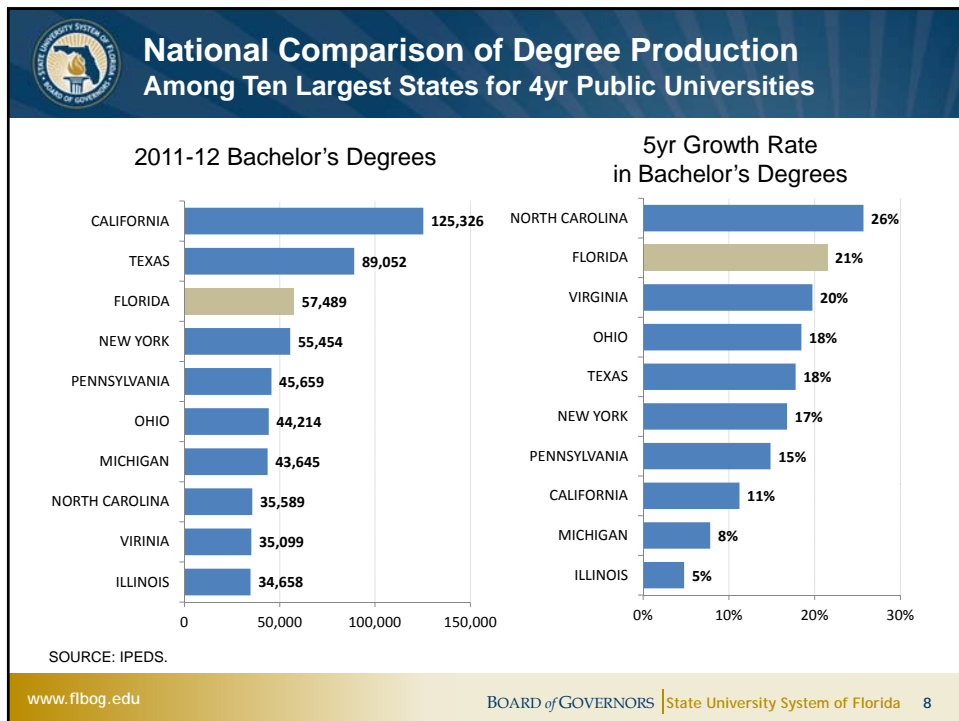
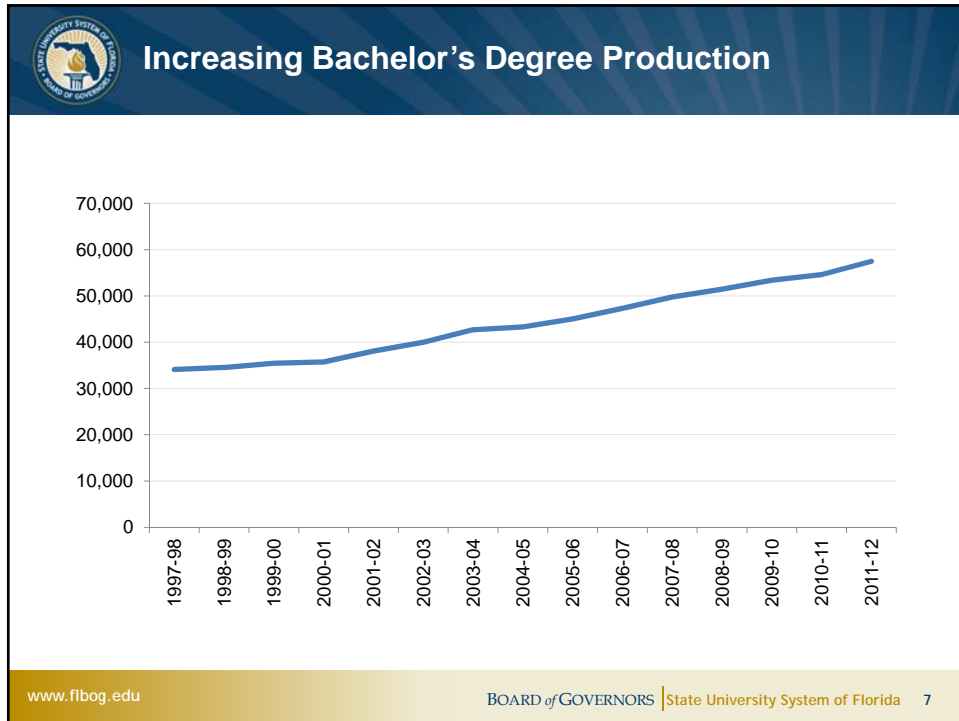
Subsequent to the Board's review of University Work Plans in June 2013, staff was directed to identify key issues that appeared to effect multiple institutions. Staff identified these key issues:

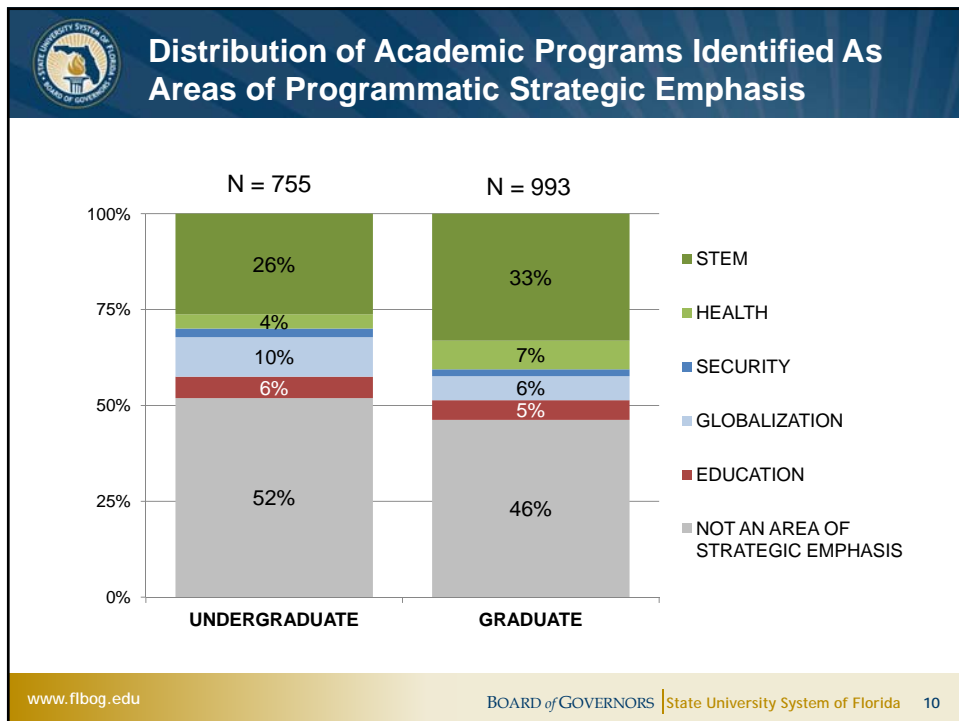
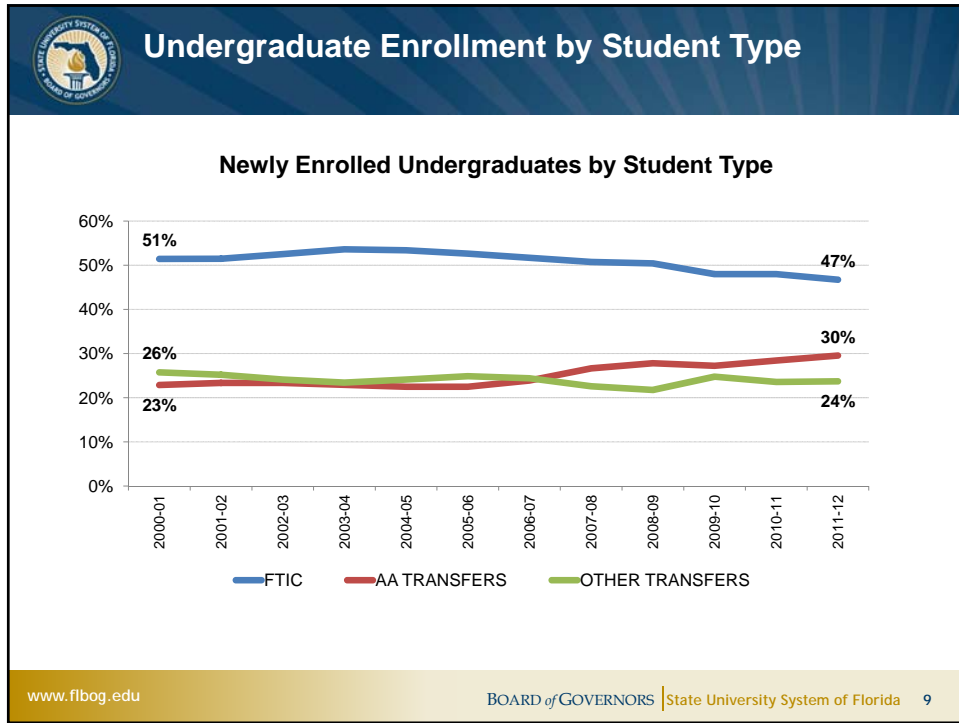
- Improving retention and graduation rates
- Increasing degree production in Programs of Strategic Emphasis (includes STEM)
- Reducing student debt
- Reducing excess hours to degree
- Ensuring academic program coordination
- Identifying key/unique academic programs and research foci

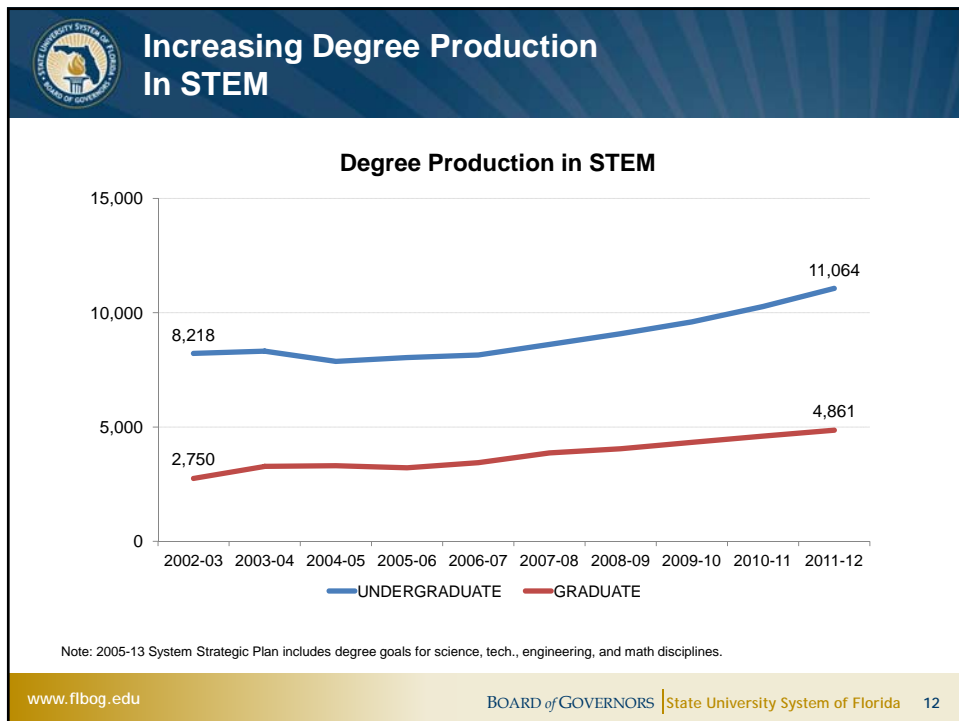
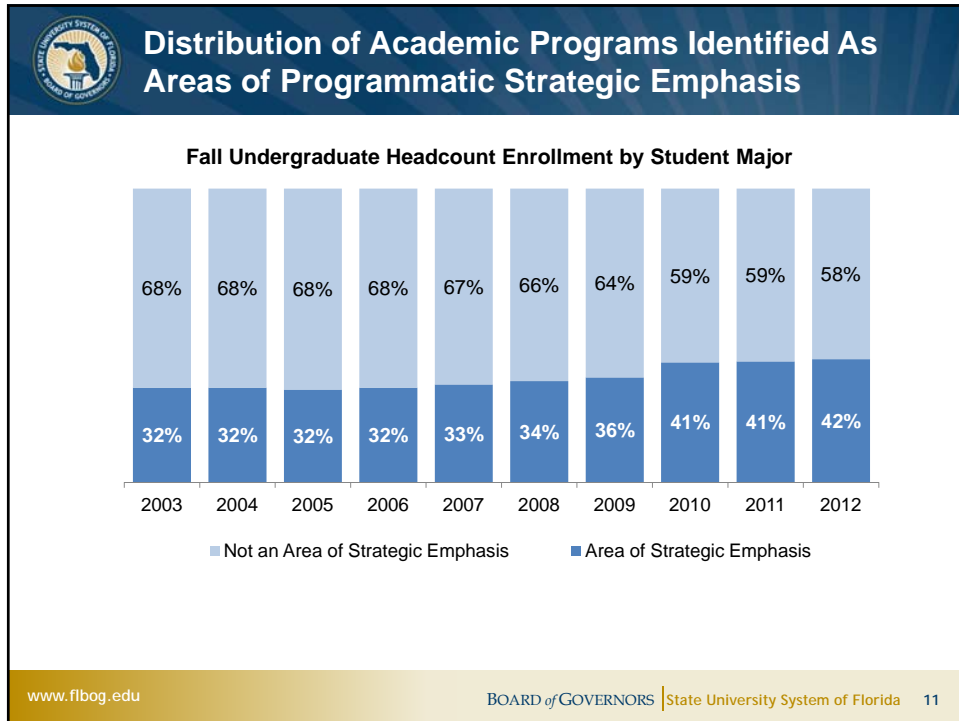
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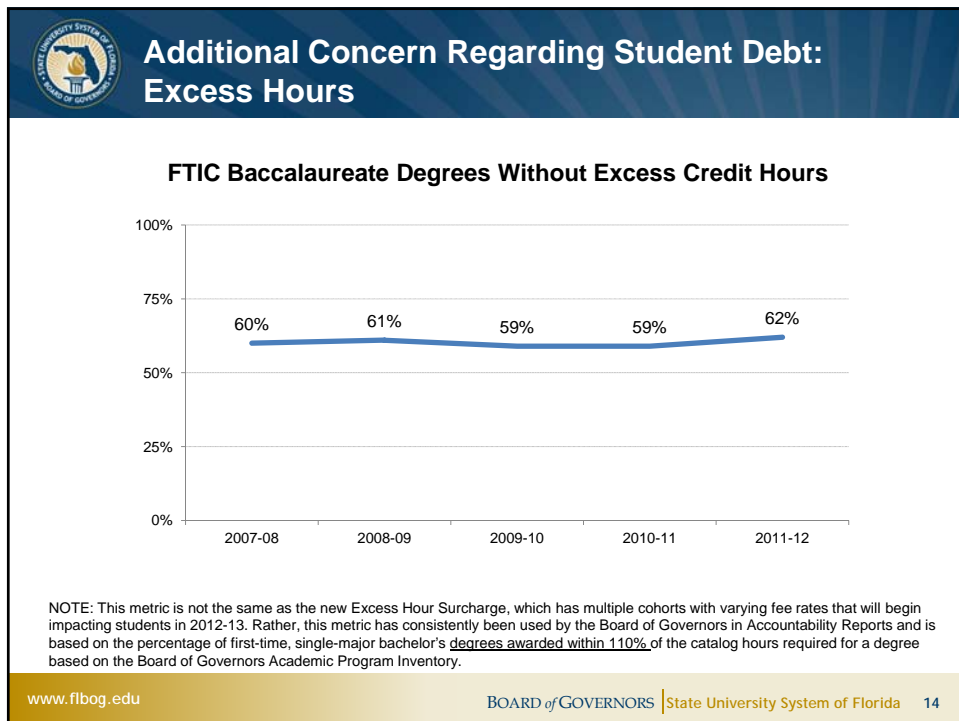
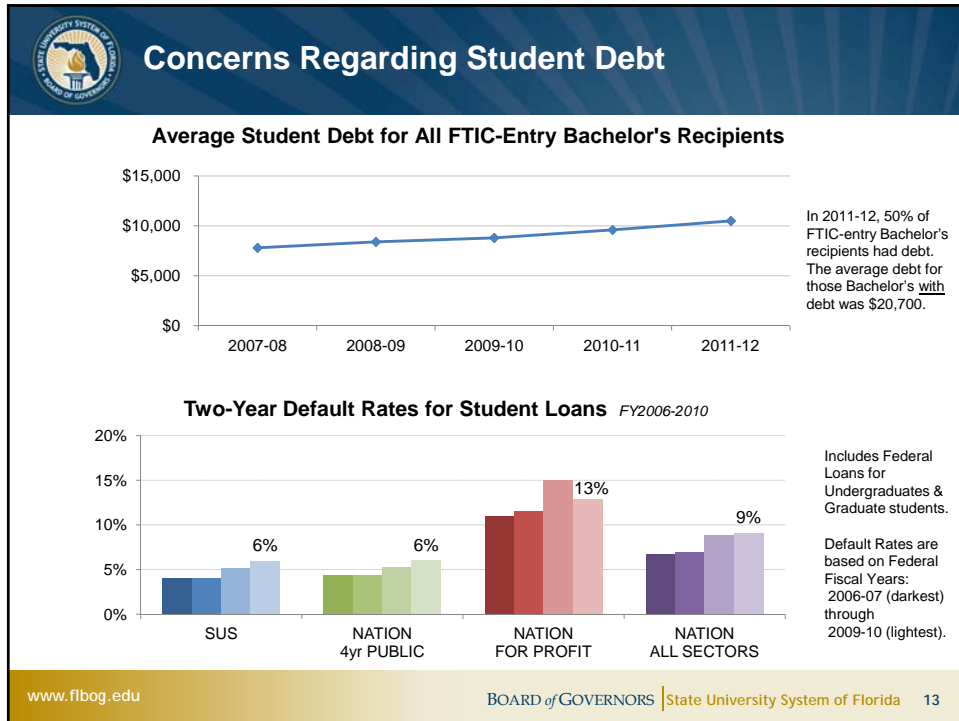

















# BOARD of GOVERNORS

## State University System of Florida

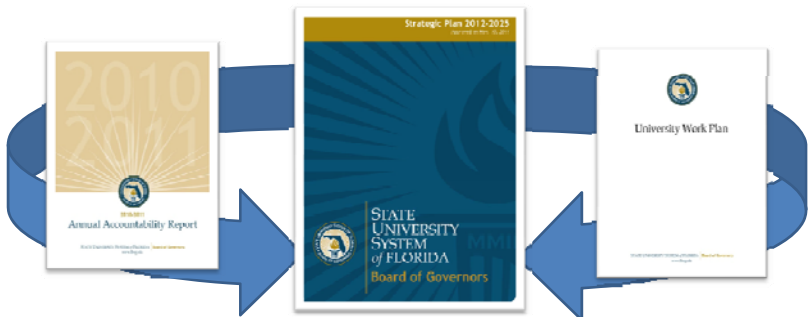
### Strategic Plan Alignment


Dr. Jan Ignash, Vice Chancellor  
Academic and Student Affairs  
September 12, 2013

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### Alignment involves all three of the Board's "Three Great Books"






**ANNUAL  
ACCOUNTABILITY  
REPORT:**  
Tracks performance on key  
metrics (past five years)



**SYSTEM-WIDE  
STRATEGIC PLAN:**  
Provides a long-range  
roadmap for the System



**UNIVERSITY  
WORK PLAN:**  
Provides a short-term plan  
of action (next three years)

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## Alignment Focal Areas

- Updating of the areas identifying Programs of Strategic Emphasis
- Revisiting Strategic Plan Goals on specific metrics
  - Are we on track for meeting our goals?
  - If not, what actions might the Board take?
- Are University Strategic Plans Aligned with the Board's Strategic Plan?



## Updating Programs of Strategic Emphasis

- Current Areas—Programs of Strategic Emphasis:
  - Critical Need: Education
  - Critical Need: Health Professions
  - Science, Technology, Engineering, and Math
  - Economic Development: Regional Workforce Demand
  - Critical Need: Security and Emergency Services
  - Economic Development: Globalization



## Strategic Plan Progress Review

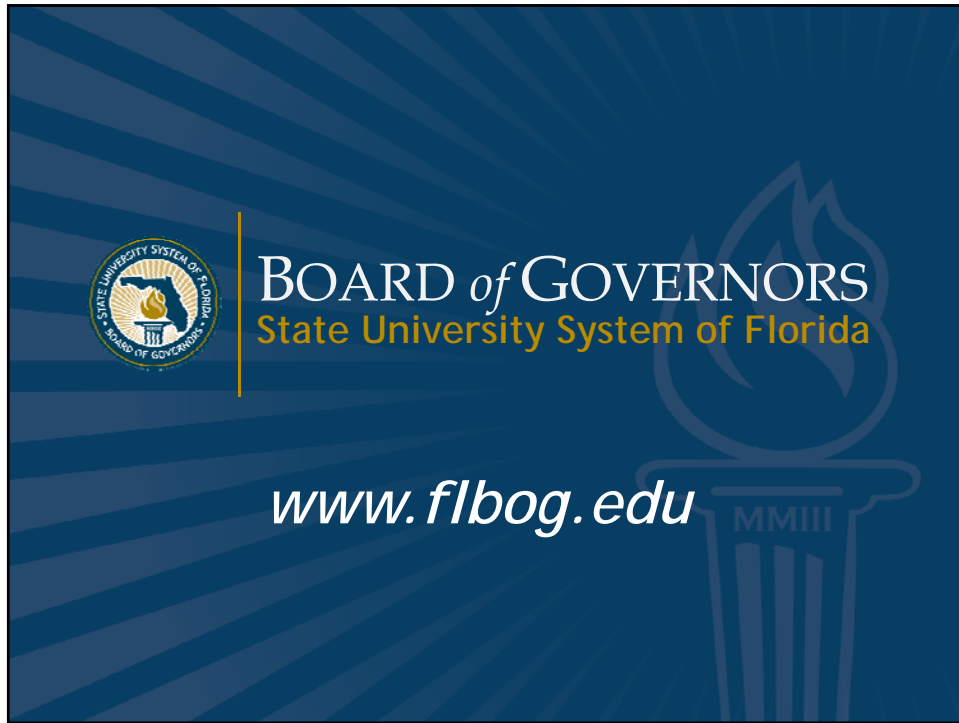
- Based on historical data and out-year projections, what is the likelihood that the Board will meet its 2025 goals on key metrics?




## Strategic Plan Progress Review

2020 Comparison of SUS Work Plan Goals to Strategic Plan Trajectory toward 2025 Goals

2025 Strategic Plan Metric	2025 Strategic Plan Goal	2020 Target	2020 Projection	2020 Work Plan Target Gap
Baccalaureate Degree Production	90,000	77,900	71,000	-9%
Graduate Degree Production	40,000	33,000	26,900	-18%
4-Year Graduation Rate	50%	46%	46%	0%
6-Year Graduation Rate	70%	66%	66%	0%
STEM Baccalaureate Production	22,500	18,100	17,400	-4%
STEM Baccalaureate % of Total Awards	25%	25%	25%	0%
STEM Graduate Production	14,000	10,500	7,100	-32%
STEM Graduate % of Total Awards	35%	30%	26%	-4%
% Baccalaureates earned without Excess Hours	80%	73%	69%	-4%
Total R&D Expenditures	\$3.25 Billion	\$2.7 Billion	\$1.7 Billion	-37%
R&D Funded Externally	67%	65%	65%	0%






**BOARD of GOVERNORS**  
**State University System of Florida**

**Board of Governors' Commission  
on Florida Higher education  
Access and Degree Attainment**

Jan Ignash, Vice Chancellor  
September 12, 2013  
[www.flbog.edu](http://www.flbog.edu)

**2 Commission Membership**

Dean Colson	Chair, Board of Governors
Marshall Criser III	Higher Education Coordinating Council and AT&T Florida
Thomas G. Kuntz	Member, Board of Governors
Wendy Link	Member, Board of Governors
Susan Pareigis	Florida Council of 100
Former Rep. William L. "Bill" Proctor	Flagler College
Kathleen Shanahan	State Board of Education



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**Board of Governors**

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3

## The Commission's Guiding Questions

- Will the pipeline of college-age students produce enough college-ready students?
- Should these new students attend our state universities, or is there a major role to be played by the State's colleges?
- Will there be any future need for additional universities or colleges to meet this demand?
- Will the increased demand be evenly distributed around the state--or will some geographic areas be disproportionately affected?



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4

## Key Gap Analysis Questions

### Shorter-term

- What industries and occupations are projected to be in greatest demand in Florida through 2020—both statewide and by region?
- What is the gap between projected demand and potential supply for areas of under-supply, such as I.T.—both statewide and by region?
- If we accept BOG degree projections to 2020, what is the potential demand for graduates in top occupations?

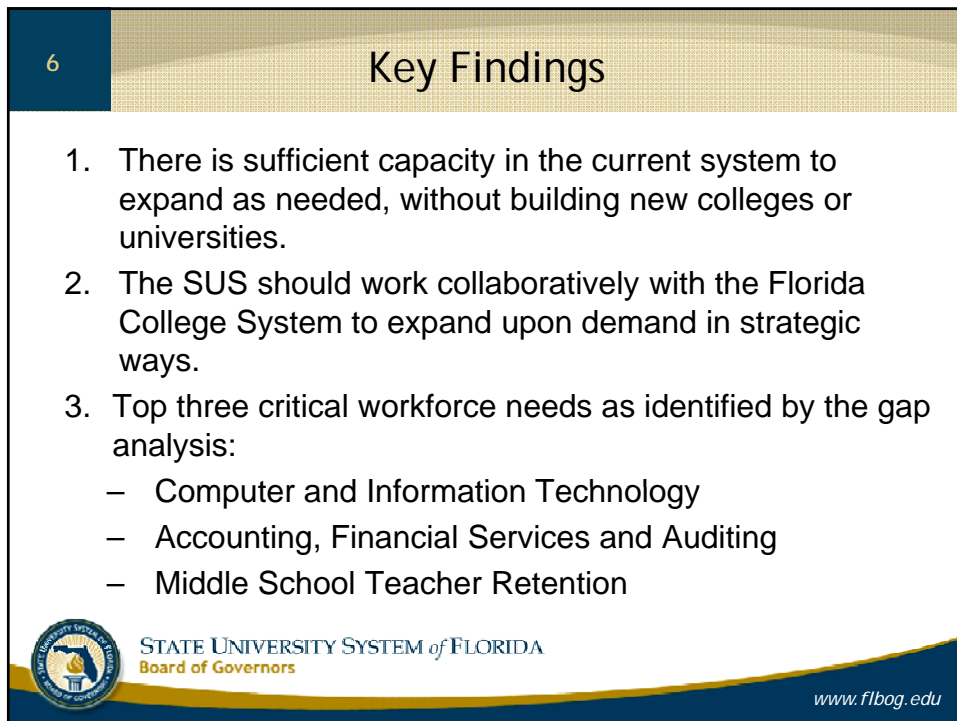
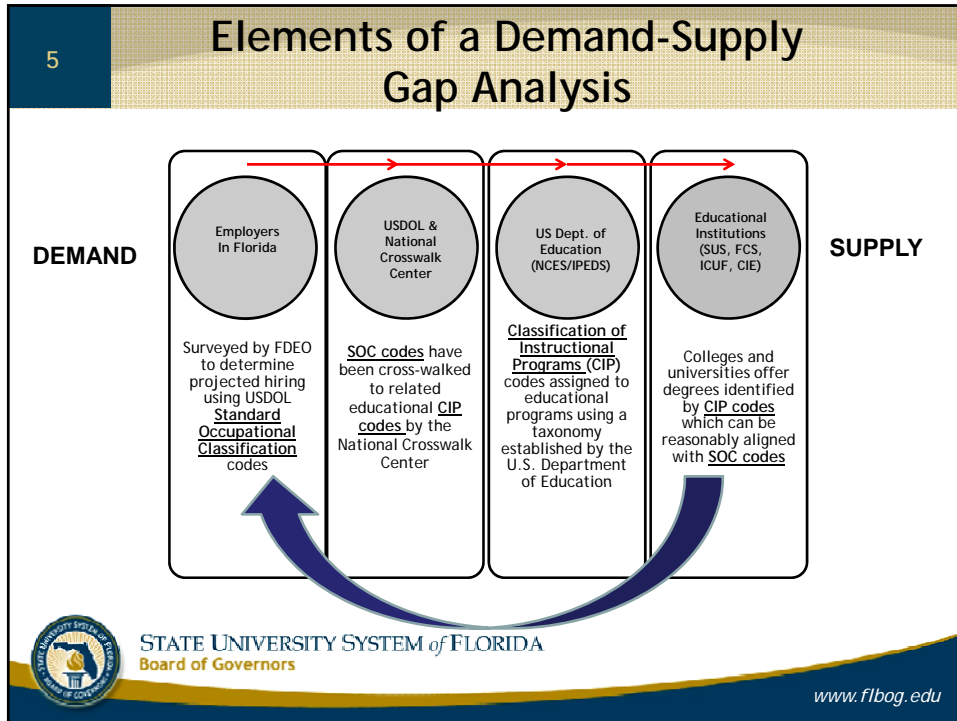
### Longer-term

- Does the Commission envision a more ambitious future for Florida – with demand for higher levels of education for future workers?



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7

## Florida's National Rankings: Considerations for Longer-Term Planning

- % of 18-24 yr. olds enrolled in college: 31<sup>st</sup>
- High school to college continuation rate: 38<sup>th</sup>
- % of 2010 population with a bachelor's or higher: 37<sup>th</sup>
- Bachelor's degrees per 18-24yr population: 34<sup>th</sup>
- Per capita gross domestic product: 40<sup>th</sup>
- Per capita net earnings: 45<sup>th</sup>
- Knowledge jobs in 2010 New Economy Index: 33<sup>d</sup>



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8

## Milestones for an RFP Process

- 11/21/13: Final report, including RFP, approved by Board of Governors
- 2/3/14: RFP applications due
- 3/19/14: Approval of grant awards by Board of Governors
- 5/15/14: Grant funds distributed to institutions
- 6/15/15: The first in a series of ongoing progress reports due to Evaluation Team



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