



**AGENDA**

**Strategic Planning Committee  
(continued)**

**Grand Ballroom, UCF Fairwinds Alumni Center  
University of Central Florida  
Orlando, Florida**

**June 17, 2014, 1:00 p.m. to 5:15 p.m.**

**June 18, 2014, 9:00 a.m. to 12:30 p.m.**

**or**

**Upon Adjournment of Previous Meetings**

**Chair: Mr. Dean Colson; Vice Chair: Ms. Patricia Frost  
Members: Beard, Chopra, Doyle, Lautenbach, Morton, Webster**

- 1. Call to Order and Opening Remarks Governor Dean Colson**
- 2. Consideration of 2014-2015 University Work Plans and Performance Funding Improvement Plans (continued) Governor Colson**
- 3. Next Steps and Closing Remarks Governor Colson**

**STATE UNIVERSITY SYSTEM OF FLORIDA  
BOARD OF GOVERNORS  
Strategic Planning Committee  
June 17-18, 2014**

**SUBJECT:** 2014-2015 University Work Plans; Approval of Performance Funding Improvement Plans

---

**PROPOSED COMMITTEE ACTION**

Consider for approval those portions of University Work Plans associated with the 2014-2015 academic year and review out-year portions of University Work Plans, noting areas for further dialogue and deliberation. Consider for approval Performance Funding Improvement Plans for the University of West Florida, New College of Florida, and Florida Atlantic University.

**AUTHORITY FOR BOARD OF GOVERNORS ACTION**

Article IX, Section 7, Florida Constitution; Board of Governors Regulation 2.002

**BACKGROUND INFORMATION**

Board Regulation 2.002 requires the development of University Work Plans. Work Plans, in conjunction with annual Accountability Report, are designed to inform strategic planning, budgeting, and other policy decisions for the State University System. Each University Work Plan is intended to reflect the institution's distinctive mission and focus on core institutional strengths within the context of State University System goals and regional and statewide needs. The Work Plan outlines the university's top priorities, strategic direction, and specific actions and financial plans for achieving those priorities, as well as performance expectations and outcomes on institutional and System-wide goals.

The University Work Plan's "Strategy" section includes institutional mission and vision statements, identification of strengths and opportunities, and key initiatives and investments. The "Key Performance Indicators" section provides metrics common to all universities, as well as metrics specific to research universities, and institution-specific indicators. The "Operations" section provides fiscal and other information, including enrollment planning and intentions to implement new academic programs in 2014-15 as well as in out-years.

Universities will make brief presentations on their Work Plans, after which Committee members will have the opportunity to engage in discussion and questioning. The Committee will consider for approval those portions of 2014-15 University Work Plans associated with the 2014-15 academic year, and review out-year portions of University Work Plans, noting areas for further dialogue and deliberation.

The Committee will also consider for approval Performance Funding Improvement Plans for the University of West Florida, New College of Florida, and Florida Atlantic University.

---

<b>Supporting Documentation Included:</b>	<ol style="list-style-type: none"> <li>1. Individual 2014-2015 University Work Plans</li> <li>2. Performance Funding Improvement Plans</li> </ol>
<b>Facilitators / Presenters:</b>	Chair Colson; University Representatives

# FAU

## 2014-15 Work Plan



**Florida Atlantic University**

*Work Plan Presentation for 2014-15 Board of Governors Review*

STATE UNIVERSITY SYSTEM of FLORIDA | **Board of Governors**



## INTRODUCTION

*The State University System of Florida has developed three tools that aid in guiding the System's future.*

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

*These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.*

*The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.*

*Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.*



## TABLE OF CONTENTS

### **1. STRATEGY**

- a. Mission Statement
- b. Vision Statement
- c. Statement of Strategy
- d. Strengths and Opportunities
- e. Key Initiatives & Investments

### **2. PERFORMANCE BASED FUNDING METRICS**

### **3. PREEMINENT RESEARCH UNIVERSITY METRICS**

### **4. OTHER KEY PERFORMANCE INDICATORS**

- a. Goals Common to All Universities
- b. Goals Specific to Research Universities
- c. Institution Specific Goals

### **5. OPERATIONS**

- a. Fiscal Information (*includes Tuition Differential Fee Request*)
- b. Enrollment Planning
- c. Academic Program Coordination

### **6. DEFINITIONS**



## MISSION STATEMENT (What is your purpose?)

Florida Atlantic University is a multi-campus public research university that pursues excellence in its missions of research, scholarship, creative activity, teaching, and active engagement with its communities.

## VISION STATEMENT (What do you aspire to?)

Florida Atlantic University aspires to be recognized as a university known for excellent and accessible undergraduate and graduate education, distinguished for the quality of its programs across multiple campuses and classified as a very high research institution that is internationally acclaimed for its contributions to creativity and research as well as its collaborations with regional partners.

## STATEMENT OF STRATEGY (How will you get there?)

*Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.*

Florida Atlantic University will provide affordable access to students in our service region and beyond who seek higher education and training. Our primary focus for the coming year will be implementing robust strategies for ongoing student success as measured by student retention and graduation rates, job placement, and acceptance in postgraduate or professional programs for those students who seek to continue their education beyond the baccalaureate degree. A major University-wide focused campaign, has been launched to address all issues associated with successful degree completion and these strategies will become part of the operational efficiency of FAU going forward.

Florida Atlantic University will meet its mission as the primary metropolitan public research university along the southeast coast of Florida by capitalizing on its strategic advantage of location. Specifically, FAU will blend outreach, cutting-edge research and partnerships with our surrounding community and beyond to help identify and solve regional and societal issues.



## STRENGTHS AND OPPORTUNITIES *(within 3 years)*

*What are your core capabilities, opportunities and challenges for improvement?*

FAU derives great benefits from the racial, cultural, ethnic and demographic diversity of its students, the environmental diversity of the location of its campuses and sites, and the economic diversity of its large and populous service area. The University produces bachelor, master and doctoral graduates who find well-compensated employment at a rate that is the highest among Florida's state universities. During the past year, FAU bachelor's graduates employed full-time in Florida or continuing their education one year after graduation was at the highest percentage (70%) of all the state universities. Similarly, FAU's bachelor's wages one year after graduation were the second highest in the state.

FAU has developed specialized programs and facilities that greatly enhance instruction and research while also providing opportunities for community engagement. These include two laboratory schools, three marine science and engineering laboratories, a medical college and a host of advanced laboratories and studios. The University's service area is home to such internationally renowned institutions as *Scripps Florida*, the *Max Planck Florida Institute for Neuroscience* (both headquartered on FAU's Jupiter campus), the *Torrey Pines Institute of Molecular Studies* and the *Vaccine and Gene Therapy Institute*. In addition, the *U.S. Navy*, *U.S. Geological Survey* and *U.S. Department of Agriculture* have research facilities in the region, and the *U.S. Department of Energy* has granted national center status to *FAU's Southeast National Marine Renewable Energy Center*. These and other partnerships give FAU faculty and students the opportunity to actively engage in research that addresses today's most complex societal issues.

The major challenge to be addressed at FAU in the next year and beyond will be student success as measured by timely progression toward degree. A University-wide focused campaign to implement best practices has been launched to address all issues associated with successful degree completion.

## KEY INITIATIVES & INVESTMENTS *(within 3 years)*

*Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.*





## 1. Student Success

FAU's primary initiatives and investments will be aimed toward continuing to improve operational efficiency related to student success as measured by increasing retention and graduation rates, and decreasing time to degree. Parallel initiatives will be implemented to enhance student services, such as academic and career advising, financial aid, etc., and to create meaningful incentives for students to remain enrolled on a full-time basis through graduation with minimal excess hours.

This past year, FAU's leadership began a multi-faceted, University-wide campus initiative to reinforce and grow our existing culture of student success. An *Assistant Provost for Student Success* was appointed whose sole role is to involve all units across the campus in assessing, planning, and employing new strategies that enhance student retention and progress towards a degree. A few examples of university wide efforts are provided below.



**Advising and Career Exploration.** Twenty-six additional advisors are being added to support and advise students as they plan their personal academic path toward successful graduation. In a proactive manner, the advisors are being trained to use intervention methods that target students who are at risk of academic difficulties; an approach that responds to early signs of academic struggle rather than being reactive (i.e., waiting for the students to contact an advisor). FAU is also employing enhanced advising technologies and tools. A new pilot program, “*Jump Start*” will begin this summer to assist students in developing skills for success in college. In addition, an emphasis on career exploration will begin when the students are accepted for admission to the university, helping students to determine majors, decrease time to degree and increase degree completion.

**Identifying and Removing Barriers to Graduation.** Institutional barriers that impede students’ progress towards graduation are being identified including improved class scheduling, a more efficient and effective method to evaluate transfer credits that lay out specific graduation requirements and an information campaign to encourage students to register early to plan their summer and fall schedules much earlier than in years past. In addition, listening forums are being held regularly with students, faculty and staff to determine ways to make FAU a student-friendly campus which has resulted in student success modules being developed for online programs and the establishment of a peer-mentoring program in the *Office of Undergraduate Research and Inquiry*, among others.

**Student Engagement.** *The Office for Undergraduate Research and Inquiry* has been created with Director and staff. Throughout the University, emphasis is being placed on increasing undergraduate student engagement in cutting-edge research activities consistent with the BOG’s goal of achieving international preeminence in targeted STEM fields and other strategic areas. FAU’s recently launched *Quality Enhancement Plan (QEP) - Distinction through Discovery* - creates opportunities for undergraduates to become deeply involved in research and scholarship under the guidance of faculty mentors. This University-wide program garnered high praise from the *Southern Association of Colleges and Schools Commission on Colleges (SACSCOC)* who visited FAU last year during the 10-year reaffirmation of accreditation process, resulting in a perfect score, an extremely rare score from a visiting team. Among its achievements already are three volumes of the *FAU Undergraduate Research Journal* and the inaugural *Florida Atlantic University Undergraduate Law Journal*. Undergraduate research at FAU is a pioneering initiative that will complement our student success objectives by enhancing undergraduate student learning through mentoring relationships with faculty, developing critical thinking and intellectual independence, developing an understanding of research methodology, and promoting an innovation-oriented culture. The goal is to give students the knowledge and experience they need to fulfill productive roles in the 21st century global economy.



## 2. Sustainable Research

FAU's location in Southeast Florida provides the university with a unique set of strategic advantages not readily available elsewhere in the state. With the Atlantic Ocean immediately to the east and the Everglades to the west, FAU is also central to one of the largest metropolitan areas in the country, serving a population of over 6.2 million people. To provide public service to this region, our current strategic plan identifies three Signature Themes underpinning the university's current and future research endeavors. The themes include 1) *Biotechnology/Neuroscience*, 2) *Marine and Coastal Issues*, and 3) *Contemporary Societal Challenges*; some examples of programs underway are shown below.

Faculty and students will be taking special advantage of FAU's unique access to existing highly sophisticated research facilities and world-class partners. FAU has already reassigned several neuroscience faculty and more than 40 students to develop a neuroscience research program in partnership with scientists at *Scripps Florida* and the *Max Planck Florida Institute for Neuroscience* (MPFIN), both located on the FAU Jupiter campus. This program, which is focusing on issues that include aging, brain development, memory loss and brain damage due to stroke, is supported by allocation of space and budget, and additional faculty researchers will be added within the next three years. Much of the research is funded by the *National Institutes of Health*. FAU and MPFIN are already offering a collaborative four-year doctoral program in integrative biology and neuroscience. In addition, planning is under way to establish an *International Max Planck Research School* on the Jupiter campus. This top-flight program would be the 64th *International Max Planck Research School* worldwide and the only one of its kind in the United States.

Other world-class facilities for marine and ocean research already exist within FAU at *Harbor Branch Oceanographic Institute* (HBOI) in Fort Pierce and the *Ocean Research Institute* (SeaTech) in Dania. Together these institutes participate in the ocean energy research program granted national center status as *FAU's Southeast National Marine Renewable Energy Center*. Faculty and students participate in interdisciplinary research designed to develop turbines anchored to the sea floor and placed in the Gulf Stream. At HBOI, other examples of faculty and student research include natural products chemistry research to discover potential therapeutic compounds from marine organisms to treat cancer, and aquaculture research to develop sustainable food supplies. At *SeaTech* faculty and students work on the design and development of autonomous underwater vehicles to explore the ocean, as well as corrosion and materials science and engineering to develop better materials for the marine industry and US Navy. At *SeaTech*, much of the research carried out by faculty and students is funded by the Office of Naval Research.

As Florida and Southeast Florida continue to be attractive retirement venues, the general population continues to reflect a large senior citizenry. FAU's Healthy Aging initiative was initially funded by the university but has since garnered federal funding, principally from the *National Institutes of Health* (NIH). This project involves faculty and students across FAU's colleges and programs addressing issues such as dementia, ambulatory care of the elderly, social services, and biomarkers for healthy aging.



### 3. Public and Private Partnerships

FAU is committed to working with public and private partners throughout South Florida and beyond to meet the region's growing workforce and economic development needs. Implementation of effective and cost-efficient strategies requires that FAU engage with partners in the public and private sectors. The recent award by the BOG of a \$3.5 million *TEAm grant* to fund creation of an accelerated pipeline for students in computer science and computer engineering involving FAU, Broward College, Palm Beach State College and over 30 companies in our service region provides an excellent example of a program that leverages the combined strength of partner institutions to meet pressing workforce needs. The University has particularly strong relationships through shared campuses and collaborative advising procedures, evidenced by 2+2 articulation agreements, implemented decades ago.

Another example of FAU's ability to establish and develop important partnerships in the community is its medical residency program, which has already been fully accredited by the *Accreditation Council for Graduate Medical Education*. This program will get under way in June 2014, when 36 residencies in internal medicine will be offered by FAU's *Graduate Medical Consortium* at Boca Raton Community Hospital, Bethesda Hospital East, Delray Medical Center, West Boca Medical Center, St. Mary's Medical Center and Palm Beach Children's Hospital. Additional residency programs in general surgery, obstetrics-gynecology, pediatrics, psychiatry, neurology, family medicine, and physical medicine and rehabilitation are scheduled to be introduced over the next three years, with 400 residency positions projected by 2019. Currently, Florida ranks eighth from the bottom among the 50 states in terms of available medical residencies, with a ratio of 19 physicians-in-training per 100,000 population. It is critically important for this situation to improve, particularly in view of the need for additional doctors to serve Florida's rapidly aging population. Doctors who carry out their residencies in Florida are likely to set up their practices in our state as well. The Association of American Medical Colleges reports that 47 percent of physicians establish their practices in the locations where they have completed their residencies.

A further example is *Tech Runway* - a new initiative from FAU's College of Business's Adams Center for Entrepreneurship, with support of the Research Park at FAU and local companies. *Tech Runway* is slated to launch in August 2014 (pending State of Florida funding) and will establish a formal program for mentoring entrepreneurs and their ventures based on examples of a similar program from Massachusetts Institute of Technology's Venture Mentoring Service (VMS). The project will combine VMS with university resources and the local business community to create an ecosystem that is conducive to the development of successful technology start-ups. *Tech Runway* will establish South Florida as a significant location for new technology related to STEM ventures by accepting 20 new technology business applicants in the first year and 40 applicants in years 2-5. *Tech Runway* will utilize existing research-focused teaching and learning environments to provide industry leaders access to multi-disciplinary approach to problem solving through case study and the use of best practices.



## PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Metrics Common To All Universities</b>						
<b>Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation</b>	0%	70%	70%	70%	70%	70%
<b>Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation</b>	1%	\$34,900	\$35,200	\$35,600	\$36,000	\$36,300
<b>Average Cost per Bachelor's Degree</b> [Instructional Costs to the University]	-2%	\$32,430	\$32,750	\$33,080	\$33,410	\$33,750
<b>FTIC 6 year Graduation Rate</b> [Includes full- and part-time students]	3%	40%	43%	45%	46%	48%
<b>Academic Progress Rate</b> [FTIC 2 year Retention Rate with GPA>2 ]	-3%	70%	70%	72%	74%	75%
<b>University Access Rate</b> [Percent of Fall Undergraduates with a Pell grant]	0%	41%	41%	42%	42%	43%
<b>Bachelor's Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	2%	53%	54%	55%	56%	57%
<b>Graduate Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	-3%	51%	53%	54%	56%	58%
<b>Board of Governors Choice Metric</b>						
<b>Percent of Bachelor's Degrees Without Excess Hours</b>	n/a	63%	64%	65%	67%	69%
<b>Board of Trustees Choice Metric</b>						
<b>Bachelor's Degree Awarded to Minorities</b>	0%	42%	42%	43%	44%	45%

Note: Metrics are defined in appendix.



## KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'<sup>1</sup>, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

---

<sup>1</sup> The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).





## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Common to All Universities

#### Academic Quality

##### National Ranking for University and Programs

**Describe plans for increasing national preeminence of University and select programs.**

FAU plans to hire outstanding faculty in strategic areas of emphasis in the signature themes of the University strategic plan (2012-2017).

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>SAT Score</b> [for 3 subtests]	87	1631	1603	1620	1630	1635
<b>High School GPA</b>	.4	3.6	3.6	3.7	3.7	3.8
<b>Professional/Licensure Exam First-time Pass Rates<sup>1</sup></b> <i>(Note: Med School grads will take exam in 2014-15)</i>						
Exams Above Benchmarks	n/a	1	1	2	2	2
Exams Below Benchmarks	n/a	0	0	0	0	0
<b>Operational Efficiency</b>						
<b>Freshman Retention Rate</b>	-4%	75%	77%	78%	79%	80%
<b>FTIC Graduation Rates</b>						
In 4 years (or less)	2%	19%	20%	21%	22%	23%
In 6 years (or less)	4%	40%	43%	45%	46%	48%
<b>AA Transfer Graduation Rates</b>						
In 2 years (or less)	0%	23%	19%	22%	23%	24%
In 4 years (or less)	1%	63%	62%	62%	62%	62%
<b>Average Time to Degree (for FTIC)</b>	0%	5.0 yrs	5.0 yrs	4.9 yrs	4.8 yrs	4.7 yrs
<b>Return on Investment</b>						
<b>Bachelor's Degrees Awarded</b>	15%	5,124	5,000	5,050	5,100	5,150
<b>Percent of Bachelor's Degrees in STEM</b>	4%	20%	24%	25%	26%	27%
<b>Graduate Degrees Awarded</b>	25%	1,543	1,474	1,500	1,525	1,550
<b>Percent of Graduate Degrees in STEM</b>	0%	16%	16%	17%	18%	19%
<b>Annual Gifts Received (\$M)</b>	15%	\$ 11.9 M	\$ 13.5 M	\$ 15.4 M	\$ 17.6 M	\$ 20.1 M
<b>Endowment (\$M)</b>	8%	\$ 189.3 M	\$ 202.3 M	\$ 216.2 M	\$ 231.1 M	\$ 247.0 M

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.



## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Specific to Research Universities

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Academic Quality</b>						
Faculty Awards	25%	4	4	5	5	6
National Academy Members	0%	2	2	2	2	3
Number of Post-Doctoral Appointees*	10%	14	16	18	20	22
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures*	n/a	2 of 8	2 of 8	2 of 8	2 of 8	2 of 8
<b>Return on Investment</b>						
Total Research Expenditures (\$M)* [includes non-Science & Engineering disciplines]	-45.9%	\$ 24.0 M	\$ 22.3 M	\$ 23.4 M	\$ 24.5 M	\$ 25.7 M
Science & Engineering Research Expenditures (\$M)*	-16.8%	\$ 10.8 M	\$ 10.6 M	\$ 11.1 M	\$ 11.7 M	\$ 12.3 M
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences (\$M)*	-4.8%	\$ 20.0 M	\$ 18.4 M	\$ 19.3 M	\$ 20.3 M	\$ 21.3 M
Percent of Research Expenditures funded from External Sources	68%	67%	62%	64%	66%	68%
Patents Issued	47%	5	7	9	11	13
Licenses/Options Executed	36%	6	16	20	25	30
Licensing Income Received (\$M)	11%	\$ .13 M	\$ .14 M	\$ .2M	\$ .25M	\$ .30M
Number of Start-up Companies	66%	1	2	3	4	5
National Rank is Higher than Predicted by the Financial Resources Ranking [based on U.S. News & World Report]	n/a	RNP 239	RNP 238	RNP 238	RNP 237	RNP 237
Research Doctoral Degrees Awarded	0%	90	94	96	98	100
Professional Doctoral Degrees Awarded (First MD class will graduate in 2014-15)	NA	13	15	77	80	86
<b>TOTAL NUMBER OF IMPROVING METRICS</b>		<b>7</b>	<b>7</b>	<b>12</b>	<b>11</b>	<b>13</b>

Note: An asterisk (\*) indicates that 2011-12 is the latest data available for these metrics

Science & Engineering Disciplines National Ranks in Top 100 for Research Expenditures are Psychology (81) Mathematical Sciences (86)





Return on Investment: An asterisk (\*) indicates figures that reflect revised reporting processes due to changes in NSF reporting guidelines.

## KEY PERFORMANCE INDICATORS

### Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

	<b>TREND</b> (2008-09 to 2012-13)	<b>2012-13</b> <b>ACTUAL</b>	<b>2013-14</b> <b>ESTIMATES</b>	<b>2014-15</b> <b>GOALS</b>	<b>2015-16</b> <b>GOALS</b>	<b>2016-17</b> <b>GOALS</b>
<b>Bachelor's Degrees Awarded to Minorities</b>	34%	2,128	2,087	2,100	2,120	2,140
<b>Percent of Course Sections Offered via Distance and Blended Learning</b>	6%*	12%	14%	16%	17%	18%
<b>Percentage of Undergraduate Students Participating in Identified Community and Business Engagement Activities (volunteer, service learning, co-op, and internships)</b>	3%	16%	19%	21%	23%	25%

An asterisk (\*) indicates that 3 year trend was used for this metric (2010-11 - 2012-13)

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

**Goal 1.** One of the guiding values of the FAU Strategic Plan "Making Waves" (2012-2017) is value and disseminate scholarship, research and creative activity, and use that scholarship to inform the academic discipline, teaching and community engagement. The FAU QEP initiative serves as an institution-wide catalyst for improvement in this area and the QEP measures serve as a broad estimate of efforts to enhance research engagement at the institutional level. Therefore, FAU plans to increase the number of undergraduate students participating in research activities, as defined and measured by the QEP initiative, by 325% by 2016.

<b>Number of Undergraduate Students Participating in Research Activities</b>	300*	968	1,700	2,050	2,700	3,150
--	------	-----	-------	-------	-------	-------

**Goal 2.** The lead guiding value of the FAU Strategic Plan "Making Waves" (2012-2017) is to prepare students to fulfill a productive destiny in the workplace and society. Therefore, FAU plans to increase the median wages of bachelor's graduates employed full time in Florida after graduation by 4% by the year 2016.

<b>Median Wages of Bachelor's Graduates Employed Full-Time on Year After Graduation</b>	n/a	34,900*	\$35,200	\$35,600	\$36,000	\$36,300
---	-----	---------	----------	----------	----------	----------

An asterisk (\*) indicates that 2011-12 was the most recent available data for this metric.

\*Baseline number of students participating in research activities during that time period.



## FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2013-14 Actual	2014-15 Appropriations
<b>Education &amp; General – Main Operations</b>		
State Funds	\$ 136.5	\$ 141.9
Tuition	\$ 124.9	\$ 129.1
<b>TOTAL MAIN OPERATIONS</b>	<b>\$ 261.4</b>	<b>\$ 271.0</b>
<b>Education &amp; General – Health-Science Center / Medical Schools</b>		
State Funds	\$ 14.5	\$ 14.4
Tuition	\$ 6.2	\$ 8.2
<b>TOTAL HSC</b>	<b>\$ 20.7</b>	<b>\$ 22.6</b>
<b>Education &amp; General – Institute of Food &amp; Agricultural Sciences (IFAS)</b>		
State Funds	\$ 0	\$0
Tuition	\$ 0	\$0
<b>TOTAL IFAS</b>	<b>\$ 0</b>	<b>\$0</b>
<b>EDUCATION &amp; GENERAL TOTAL REVENUES</b>	<b>\$ 282.1</b>	<b>\$293.6</b>

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.

## OTHER BUDGET ENTITIES

**Auxiliary Enterprises**

Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues	\$ 99.3	n/a
----------	---------	-----

**Contracts & Grants**

Resources received from federal, state or private sources for the purposes of conducting research and public service activities.

Revenues	\$ 61.2	n/a
----------	---------	-----

**Local Funds**

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues	\$ 224.9	n/a
----------	----------	-----

**Faculty Practice Plans**

Revenues/receipts are funds generated from faculty practice plan activities.

Revenues	\$ 0	n/a
----------	------	-----

**OTHER BUDGET ENTITY TOTAL REVENUES**

\$ 385.4	n/a
----------	-----

**UNIVERSITY REVENUES GRAND TOTAL**

\$ 667.5	n/a
----------	-----



## FISCAL INFORMATION (continued)

## Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition	\$3,099.60	\$3,099.60	\$3,152.10	\$3,152.10	\$3,152.10
Tuition Differential Fee	\$1,203.90	\$1,203.90	\$1,203.90	\$1,203.90	\$1,203.90
Percent Increase	15%	1.2%	0%	0%	0%
Required Fees <sup>1</sup>	\$1,836.50	\$1,836.50	\$1,836.50	\$1,836.50	\$1,836.50
<b>TOTAL TUITION AND FEES</b>	<b>\$6,140.00</b>	<b>\$6,140.00</b>	<b>\$6,192.50</b>	<b>\$6,192.50</b>	<b>\$6,192.50</b>

Note<sup>1</sup>: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

## Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	46%	48%	46%	48%	48%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$18,342	\$19,889	\$19,281	\$19,898	\$20,096
NSLDS Cohort Year	2008	2009	2010	2011	2012 GOAL
Student Loan Cohort Default Rate (3rd Year)	6.9% <i>trial</i>	7.6%	8.5%	7.6% <i>draft</i>	7.9%

## Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,388	\$1,220	\$11,556	\$1,890	\$2,127	\$22,181
AT HOME	\$5,388	\$1,220	\$1,354	\$3,167	\$2,127	\$13,256

## Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES		AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT	
	HEADCOUNT	PERCENT					
Below \$40,000	4,545	39%	\$12,007	\$(2,161)	\$7,544	\$4,153	
\$40,000-\$59,999	1,305	11%	\$13,460	\$15	\$5,410	\$3,696	
\$60,000-\$79,999	879	7%	\$15,386	\$1,729	\$3,707	\$4,038	
\$80,000-\$99,999	695	6%	\$16,306	\$2,826	\$2,655	\$4,300	
\$100,000 Above	2,207	19%	\$17,082	\$3,088	\$2,393	\$3,465	
Missing*	2,087	18%	n/a	\$3,731	\$1,178	\$88	
TOTAL	11,718	100%	AVERAGE	\$13,985	\$707	\$4,624	\$3,249

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note\*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

Effective Date	
University Board of Trustees approval date:	TBA
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	N/A
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	N/A
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$40.13
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0%
\$ Increase in tuition differential per credit hour:	\$0
\$ Increase in tuition differential for 30 credit hours:	\$0
Projected Differential Revenue Generated	
Incremental revenue generated in 2014-15 (projected):	\$0
Total differential fee revenue generated in 2014-15 (projected):	\$0
Intended Uses	
Describe how the revenue will be used. FAU is not requesting an increase in the tuition differential for 2014-15	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
N/A	
Request to Modify or Waive Tuition Differential Uses (pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)	
N/A	



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2013-14 academic year.

2013-2014 - 70% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
To ensure access, degree completion, meet student demand, continue FTE goals, and augment advising	FTE production is estimated to be increased by 2 %
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	154
Total Number of Advisors Hired or Retained (funded by tuition differential):	8
Total Number of Course Sections Added or Saved (funded by tuition differential):	986
2013-2014 - 30% Initiatives (list the initiatives provided in the 2013-14 tuition differential request)	University Update on Each Initiative
To augment existing need based funds	\$5,984,989 is estimated to be added to the Financial Aid need based pool of funds for students
Additional Information (estimates as of April 30, 2014):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	4,770
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1,645
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	215
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	3,300



**FISCAL INFORMATION (continued)**  
**TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,**  
**& AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15**

**University Tuition Differential**

Budget Entity: 48900100 (Educational &amp; General)

SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)

	<b>Estimated Actual*</b> <b>2013-14</b>	<b>Estimated</b> <b>2014-15</b>
	-----	-----
<b><u>FTE Positions:</u></b>		
Faculty	153.90	154.00
Advisors	8.00	9.00
Staff	17.16	18.00
Total FTE Positions:	179.06	181.00
<b><u>Balance Forward from Prior Periods</u></b>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<b><u>Receipts / Revenues</u></b>		
Tuition Differential Collections	\$ 19,650,714	19,847,221
Interest Revenue - Current Year	299,249	302,241
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 19,949,963	\$ 20,149,462
<b><u>Expenditures</u></b>		
Salaries & Benefits	\$ 13,578,037	\$ 13,714,623
Other Personal Services	386,937	390,000
Expenses	5,984,989	6,044,839
Operating Capital Outlay	-	-
Student Financial Assistance	-	-
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ 19,949,963	\$ 20,149,462
<b>Ending Balance Available:</b>	<b>\$ -</b>	<b>\$ -</b>

\*Since the 2013-14 year has not been completed, provide an estimated actual.

\*\*Provide details for "Other Categories" used.



## FISCAL INFORMATION (continued)

### UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

This page is an excel document, pasted here as a placeholder.

<b>University:</b>							
<b>Undergraduate Students</b>	<b>Actual</b>			<b>Projected</b>			
	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>
<b>Tuition:</b>							
Base Tuition - (0% inc. for 2014-15 to 2017-18)	\$103.32	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07
Tuition Differential	21.42	\$40.13	\$40.13	\$40.13	\$40.13	\$40.13	\$40.13
<b>Total Base Tuition &amp; Differential per Credit Hour</b>	<b>\$124.74</b>	<b>\$143.45</b>	<b>\$143.45</b>	<b>\$145.20</b>	<b>\$145.20</b>	<b>\$145.20</b>	<b>\$145.20</b>
% Change		15.0%	0.0%	1.2%	0.0%	0.0%	0.0%
<b>Fees (per credit hour):</b>							
Student Financial Aid <sup>1</sup>	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Capital Improvement <sup>2</sup>	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$11.96	\$12.32	\$12.32	\$12.32	\$12.32	\$12.32	\$12.32
Health	\$9.42	\$9.42	\$9.42	\$9.42	\$9.42	\$9.42	\$9.42
Athletic	\$16.45	\$17.27	\$17.27	\$17.27	\$17.27	\$17.27	\$17.27
Transportation Access	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Technology <sup>1</sup>	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student Life & Services Fee (UNF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Marshall Center Fee (USF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student Affairs Facility Use Fee (FSU only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total Fees</b>	<b>\$52.91</b>	<b>\$56.09</b>	<b>\$56.09</b>	<b>\$56.09</b>	<b>\$56.09</b>	<b>\$56.09</b>	<b>\$56.09</b>
<b>Total Tuition and Fees per Credit Hour</b>	<b>\$177.65</b>	<b>\$199.54</b>	<b>\$199.54</b>	<b>\$201.29</b>	<b>\$201.29</b>	<b>\$201.29</b>	<b>\$201.29</b>
% Change		12.3%	0.0%	0.9%	0.0%	0.0%	0.0%
<b>Fees (block per term):</b>							
Activity & Service							
Health							
Athletic							
Transportation Access	\$76.90	\$76.90	\$76.90	\$76.90	\$76.90	\$76.90	\$76.90
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
List any new fee proposed							
<b>Total Block Fees per term</b>	<b>\$76.90</b>	<b>\$76.90</b>	<b>\$76.90</b>	<b>\$76.90</b>	<b>\$76.90</b>	<b>\$76.90</b>	<b>\$76.90</b>
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Tuition for 30 Credit Hours</b>	<b>\$3,742.20</b>	<b>\$4,303.50</b>	<b>\$4,303.50</b>	<b>\$4,356.00</b>	<b>\$4,356.00</b>	<b>\$4,356.00</b>	<b>\$4,356.00</b>
<b>Total Fees for 30 Credit Hours</b>	<b>\$1,741.10</b>	<b>\$1,836.50</b>	<b>\$1,836.50</b>	<b>\$1,836.50</b>	<b>\$1,836.50</b>	<b>\$1,836.50</b>	<b>\$1,836.50</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$5,483.30</b>	<b>\$6,140.00</b>	<b>\$6,140.00</b>	<b>\$6,192.50</b>	<b>\$6,192.50</b>	<b>\$6,192.50</b>	<b>\$6,192.50</b>
\$ Change		\$656.70	\$0.00	\$52.50	\$0.00	\$0.00	\$0.00
% Change		12.0%	0.0%	0.9%	0.0%	0.0%	0.0%
<b>Out-of-State Fees</b>							
Out-of-State Undergraduate Fee	\$457.28	\$493.86	\$493.86	\$493.86	\$493.86	\$493.86	\$493.86
Out-of-State Undergraduate Student Financial Aid <sup>3</sup>	\$22.24	\$24.69	\$24.69	\$24.69	\$24.69	\$24.69	\$24.69
Total per credit hour	\$479.52	\$518.55	\$518.55	\$518.55	\$518.55	\$518.55	\$518.55
% Change		8.1%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Tuition for 30 Credit Hours</b>	<b>\$17,460.60</b>	<b>\$19,119.30</b>	<b>\$19,119.30</b>	<b>\$19,171.80</b>	<b>\$19,171.80</b>	<b>\$19,171.80</b>	<b>\$19,171.80</b>
<b>Total Fees for 30 Credit Hours</b>	<b>\$2,408.30</b>	<b>\$2,577.20</b>	<b>\$2,577.20</b>	<b>\$2,577.20</b>	<b>\$2,577.20</b>	<b>\$2,577.20</b>	<b>\$2,577.20</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$19,868.90</b>	<b>\$21,696.50</b>	<b>\$21,696.50</b>	<b>\$21,749.00</b>	<b>\$21,749.00</b>	<b>\$21,749.00</b>	<b>\$21,749.00</b>
\$ Change		\$1,827.60	\$0.00	\$52.50	\$0.00	\$0.00	\$0.00
% Change		9.2%	0.0%	0.2%	0.0%	0.0%	0.0%
<b>Housing/Dining<sup>4</sup></b>	<b>\$9,071.88</b>	<b>\$9,344.04</b>	<b>\$9,624.36</b>	<b>\$9,913.09</b>	<b>\$10,210.48</b>	<b>\$10,516.80</b>	<b>\$10,832.30</b>
\$ Change		\$272.16	\$280.32	\$288.73	\$297.39	\$306.31	\$315.50
% Change		3.0%	3.0%	3.0%	3.0%	3.0%	3.0%

<sup>1</sup> can be no more than 5% of tuition.<sup>3</sup> can be no more than 5% of tuition and the out-of-state fee.<sup>2</sup> as approved by the Board of Governors.<sup>4</sup> combine the most popular housing and dining plans provided to students





## ENROLLMENT PLANNING

### Planned Enrollment Growth by Student Type *(for all E&G students at all campuses)*

	5 YEAR TREND (2008-13)	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	21%	11,601	47%	11,682	47%	11,764	47%	11,846	47%
FTIC (Profile Admit)	-57%	198	1%	199	1%	201	1%	202	1%
AA Transfers*	46%	7,611	31%	7,664	31%	7,718	31%	7,772	31%
Other Transfers	-18%	5,173	21%	5,209	21%	5,246	21%	5,282	21%
Subtotal	13%	24,583	100%	24,755	100%	24,928	100%	25,103	100%
GRADUATE STUDENTS									
Master's	12%	3,541	81%	3,559	81%	3,576	81%	3,594	81%
Research Doctoral	5%	778	18%	778	18%	778	18%	778	18%
Professional Doctoral	221%	55	1%	55	1%	55	1%	55	1%
Subtotal	12%	4,374	100%	4,392	100%	4,409	100%	4,427	100%
NOT-DEGREE SEEKING	-6%	1,664		1,600		1,600		1,600	
MEDICAL	n/a	187		256		256		256	
TOTAL	12%	30,808		31,003		31,193		31,386	

Note\*: AA transfers refer only to transfers from the Florida College System.

### Planned Enrollment Growth by Method of Instruction *(for all E&G students at all campuses)*

	2 YEAR TREND (2010-11 to 2012-13)	2012-13		2014-15		2015-16		2016-17	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
<b>UNDERGRADUATE</b>									
DISTANCE (>80%)	39%	1,385	9%	1,541	10%	2,014	13%	2,491	16%
HYBRID (50%-79%)	93%	958	6%	1,695	11%	2,014	13%	2,335	15%
TRADITIONAL (<50%)	-2.8%	12,992	85%	12,176	79%	11,462	74%	10,741	69%
<b>TOTAL</b>	<b>7.0%</b>	<b>15,335</b>	<b>100%</b>	<b>15,412</b>	<b>100%</b>	<b>15,490</b>	<b>100%</b>	<b>15,567</b>	<b>100%</b>
<b>GRADUATE</b>									
DISTANCE (80%)	11%	495	22%	534	24%	546	24%	558	25%
HYBRID (50%-79%)	1.7%	39	2%	45	2%	56	3%	66	3%
TRADITIONAL (<50%)	-7%	1,690	76%	1,647	74%	1,626	73%	1,606	72%
<b>TOTAL</b>	<b>-2.6%</b>	<b>2,224</b>	<b>100%</b>	<b>2,226</b>	<b>100%</b>	<b>2,229</b>	<b>100%</b>	<b>2,230</b>	<b>100%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).





## ENROLLMENT PLANNING (continued)

### Planned Enrollment Plan by Residency and Student Level *(Florida FTE)*

	Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*
<b>STATE FUNDABLE</b>									
<b>Florida Resident</b>									
LOWER	6,432	4,461	6,464	6,496	6,529	6,561	6,594	6,627	.5%
UPPER	8,386	7,910	8,428	8,470	8,512	8,555	8,597	8,640	.5%
GRAD I	1,626	1,626	1,626	1,626	1,626	1,626	1,626	1,626	0%
GRAD II	300	300	300	300	300	300	300	300	0%
<b>TOTAL</b>	<b>16,744</b>	<b>14,297</b>	<b>16,818</b>	<b>16,892</b>	<b>16,967</b>	<b>17,042</b>	<b>17,117</b>	<b>17,193</b>	<b>.4%</b>
<b>Non- Resident</b>									
LOWER	365	n/a	371	376	382	388	393	399	1.5%
UPPER	349	n/a	354	359	364	370	375	381	1.5%
GRAD I	172	n/a	172	172	172	172	172	172	0%
GRAD II	98	n/a	98	98	98	98	98	98	0%
<b>TOTAL</b>	<b>983</b>	<b>n/a</b>	<b>995</b>	<b>1,005</b>	<b>1,016</b>	<b>1,028</b>	<b>1,038</b>	<b>1,050</b>	<b>1%</b>
<b>TOTAL</b>									
LOWER	6,797	n/a	6,835	6,872	6,911	6,949	6,988	7,026	.6%
UPPER	8,734	n/a	8,781	8,829	8,877	8,925	8,973	9,021	.5%
GRAD I	1,798	n/a	1,798	1,798	1,798	1,798	1,798	1,798	0%
GRAD II	398	n/a	398	398	398	398	398	398	0%
<b>TOTAL</b>	<b>17,727</b>	<b>n/a</b>	<b>17,812</b>	<b>17,897</b>	<b>17,984</b>	<b>18,070</b>	<b>18,157</b>	<b>18,243</b>	<b>.5%</b>
<b>NOT STATE FUNDABLE</b>									
LOWER	0	n/a	0	0	0	0	0	0	0%
UPPER	0	n/a	0	0	0	0	0	0	0%
GRAD I *	325	n/a	482	594	636	638	655	673	8%
GRAD II	0	n/a	0	0	0	0	0	0	0%
<b>TOTAL</b>	<b>325</b>	<b>n/a</b>	<b>482</b>	<b>594</b>	<b>636</b>	<b>638</b>	<b>655</b>	<b>673</b>	<b>8%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note\*: The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.

### Medical Student Headcount Enrollments

#### Medical Doctorate Headcounts

RESIDENT	156	205	205	205	205	205	205	205	0%
NON-RESIDENT	31	51	51	51	51	51	51	51	0%
<b>TOTAL</b>	<b>187</b>	<b>256</b>	<b>256</b>	<b>256</b>	<b>256</b>	<b>256</b>	<b>256</b>	<b>256</b>	<b>0%</b>

#### Dentistry Headcounts

RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>TOTAL</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>

#### Veterinary Headcounts

RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
<b>TOTAL</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>	<b>n/a</b>



Note\*: Grad I market rate programs that are expected to grow are MBA, Executive MBA, Executive MHA, and Master of Science in Finance



## ACADEMIC PROGRAM COORDINATION

### New Programs For Consideration by University in AY 2014-15

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
<b>MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS</b>						
M Education Psychology	42.2806	EDUC	FSU		65	Jan 2015
M Education Instructional Technology	13.0501	EDUC	FSU, UCF, UWF		40	Jan 2015
M Education in Secondary Education*	13.1205	EDUC	FGCU, FSU, UNF		85	Jan 2015
<b>DOCTORAL PROGRAMS</b>						
DSW Social Work*	44.0701				70	May 2014

### New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Bachelors in General Studies	24.0106		USF T		300	Jan 2015
<b>MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS</b>						
PSM Marine Science	26.1302	STEM	USF T (40.0607)		30	May 2015
Physician's Assistant	51.0912	HEALTH	UF, USF, FIU		70	May 2015
<b>DOCTORAL PROGRAMS</b>						



Note\*: An asterisk indicates these degree programs were approved at November CAVP meeting.

## DEFINITIONS

### Performance Based Funding

**Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation**

This metric is based on the percentage of a graduating class of bachelor's degree recipients who are employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded.  
Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation.  
Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Median Wages of Bachelor's Graduates Employed Full-time in Florida One Year After Graduation**

This metric is based on annualized Unemployment Insurance (UI) wage data from the fourth fiscal quarter after graduation for bachelor's recipients. UI wage data does not include individuals who are self-employed, employed out of state, employed by the military or federal government, those without a valid social security number, or making less than minimum wage.  
Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Average Cost per Bachelor's Degree**  
*Instructional costs to the university*

For each of the last four years of data, the annual total undergraduate instructional expenditures were divided by the total fundable student credit hours to create a cost per credit hour for each year. This cost per credit hour was then multiplied by 30 credit hours to derive an average annual cost. The average annual cost for each of the four years was summed to provide an average cost per degree for a baccalaureate degree that requires 120 credit hours.  
Sources: State University Database System (SUDS), Expenditure Analysis: Report IV (2009-10 through 2012-13).

**Six Year FTIC Graduation Rate**

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Students of degree programs longer than four years (eg, PharmD) are included in the cohorts. Students who are active duty military are not included in the data.  
Source: State University Database System (SUDS).

**Academic Progress Rate**  
*2nd Year Retention with GPA Above 2.0*

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with had a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer).  
Source: State University Database System (SUDS).

**University Access Rate**  
*Percent of Undergraduates with a Pell-grant*

This metric is based the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric.  
Source: State University Database System (SUDS).

**Bachelor's Degrees Awarded within Programs of Strategic Emphasis**  
(includes STEM)

This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).  
Source: State University Database System (SUDS).

**Graduate Degrees Awarded within Programs of Strategic Emphasis**  
(includes STEM)

This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).  
Source: State University Database System (SUDS).

**Freshmen in Top 10% of High School Class**

Applies to: NCF

Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class.

Source: New College of Florida.

**BOG Choice Metrics****Percent of Bachelor's Degrees Without Excess Hours**

This metric is based on the percentage of baccalaureate degrees awarded within 110% of the credit hours required for a degree based on the Board of Governors Academic Program Inventory.

Note: It is important to note that the statutory provisions of the "Excess Hour Surcharge" (1009.286, FS) have been modified several times by the Florida Legislature, resulting in a phased-in approach that has created three different cohorts of students with different requirements. The performance funding metric data is based on the latest statutory requirements that mandates 110% of required hours as the threshold. In accordance with statute, this metric excludes the following types of student credits (ie, accelerated mechanisms, remedial coursework, non-native credit hours that are not used toward the degree, non-native credit hours from failed, incomplete, withdrawn, or repeated courses, credit hours from internship programs, credit hours up to 10 foreign language credit hours for transfer students in Florida, and credit hours earned in military science courses that are part of the Reserve Officers' Training Corps (ROTC) program).

Source: State University Database System (SUDS).

**Number of Faculty Awards**

This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards. Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).

**National Ranking for Institutional & Program Achievements**

This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

Source: Board of Governors staff review.

**BOT Choice Metrics****Percent of R&D Expenditures Funded from External Sources FAMU**

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.

Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

**Bachelor's Degrees Awarded to Minorities FAU, FGCU, FIU**

This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code.

Source: State University Database System (SUDS).

**National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News FSU**

This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count.

Source: US News and World Report's annual National University rankings.



**Percent of Undergraduate Seniors Participating in a Research Course**  
NCF

This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year.  
Source: New College of Florida.

**Number of Bachelor Degrees Awarded Annually**  
UCF

This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once.  
Source: State University Database System (SUDS).

**Total Research Expenditures**  
UF

This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year.  
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

**Percent of Course Sections Offered via Distance and Blended Learning**  
UNF

This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both.  
Source: State University Database System (SUDS).

**Number of Postdoctoral Appointees**  
USF

This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar.  
Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).

**Percentage of Adult Undergraduates Enrolled**  
UWF

This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified.  
Source: State University Database System (SUDS).

**Preeminent Research University Funding Metrics**

**Average GPA and SAT Score**

An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').

**Public University National Ranking**

A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

**Freshman Retention Rate**  
(Full-time, FTIC)

Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.





<b>6-year Graduation Rate</b> (Full-time, FTIC)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1%-2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.
<b>National Academy Memberships</b>	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of \$200 million or more, as reported annually by the National Science Foundation (NSF).
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount.
<b>National Ranking in S.T.E.M. Research Expenditures</b>	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
<b>Patents Awarded</b> (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/20100101->20131231 AND APT/1)".
<b>Doctoral Degrees Awarded Annually</b>	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report. Note: per legislative workpapers, this metric does not include Professional degrees.
<b>Number of Post-Doctoral Appointees</b>	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Endowment Size (\$M)</b>	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.



### Goals Common to All Universities

#### Academic Quality

<b>Avg. SAT Score</b> (for 3 subtests)	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Avg. HS GPA</b>	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
<b>Professional/Licensure Exam First-time Pass Rates</b>	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.

#### Operational Efficiency

<b>Freshman Retention Rate</b>	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see <a href="#">link</a> .
<b>FTIC Graduation Rates</b> In 4 years (or less) In 6 years (or less)	As reported in the 2012-13 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>AA Transfer Graduation Rates</b> In 2 years (or less) In 4 years (or less)	As reported in the 2012-13 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>Average Time to Degree (for FTIC)</b>	This metric is the number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.

#### Return on Investment

<b>Bachelor's Degrees Awarded</b>	This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).
<b>Percent of Bachelor's Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 4H).
<b>Graduate Degrees Awarded</b>	This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).
<b>Percent of Graduate Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).
<b>Annual Gifts Received (\$M)</b>	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at <a href="http://www.cae.org/vse">www.cae.org/vse</a> .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
<b>Endowment (\$M)</b>	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).





## Goals Specific to Research Universities

### Academic Quality

#### Faculty Awards

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

#### National Academy Members

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

#### Number of Post-Doctoral appointees

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).

#### Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures

The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at [link](#)), but now data must be queried via WebCASPAR – see [link](#).

### Return on Investment

#### Total Research Expenditures (\$M)

Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Science & Engineering Research Expenditures in non-medical/health sciences

This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see [link](#), table 36 *minus* table 52), but now data must be queried via WebCASPAR.

#### Percent of R&D Expenditures funded from External Sources

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Patents Issued

The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).

#### Licenses/Options Executed

Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).

#### Licensing Income Received (\$M)

License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2012-13 Accountability Report (table 6A).

#### Number of Start-up Companies

The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2012-13 Accountability Report (table 6A).

#### National rank is higher than predicted by Financial Resources Ranking

*based on US News & World Report*

This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.



<b>Research Doctoral Degrees Awarded</b>	The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).
<b>Professional Doctoral Degrees Awarded</b>	The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

### Student Debt Summary

#### Percent of Bachelor's Recipients with Debt

This is the percentage of bachelor's graduates in a given academic year who entered the university as a first-time-in-college (FTIC) student and who borrowed through any loan programs (institutional, state, Federal Perkins, Federal Stafford Subsidized and unsubsidized, private) that were certified by your institution - excludes parent loans.  
Source: Common Dataset (H4).

#### Average Amount of Debt for Bachelor's who have graduated with debt

This is the average amount of cumulative principal borrowed (from any loan program certified by the institution) for each native, FTIC bachelor's recipient in a given academic year that graduated with debt – see metric definition above. This average does NOT include students who did not enter a loan program that was certified by the institution.  
Source: Common Dataset (H5).

#### Student Loan Cohort Default Rate (3rd Year)

Student loan cohort default rate (CDR) data includes undergraduate and graduate students, and refers to the three federal fiscal year period when the borrower enters repayment and ends on the second fiscal year following the fiscal year in which the borrower entered repayment. Cohort default rates are based on the number of borrowers who enter repayment, not the number and type of loans that enter repayment. A borrower with multiple loans from the same school whose loans enter repayment during the same cohort fiscal year will be included in the formula only once for that cohort fiscal year. Default rate debt includes: Federal Stafford Loans, and Direct Stafford/Ford Loans – for more information see:  
<http://ifap.ed.gov/DefaultManagement/CDRGuideMaster.html>.

Three Year CDR			
Cohort Fiscal Year	Year Published	Borrowers in the Numerator Borrowers in the Denominator	3-Yr Time Period (Numerator) 1-Yr Time Period (Denominator)
2009	2012	Borrowers who entered repayment in 2009 and defaulted in 2009, 2010 or 2011 Borrowers who entered repayment in 2009	10/01/2008 to 9/30/2011 10/01/2008 to 9/30/2009
2010	2013	Borrowers who entered repayment in 2010 and defaulted in 2010, 2011 or 2012 Borrowers who entered repayment in 2010	10/01/2009 to 9/30/2012 10/01/2009 to 9/30/2010
2011	2014*	Borrowers who entered repayment in 2011 and defaulted in 2011, 2012 or 2013 Borrowers who entered repayment in 2011	10/01/2010 to 9/30/2013 10/01/2010 to 9/30/2011
2012	2015	Borrowers who entered repayment in 2012 and defaulted in 2012, 2013 or 2014 Borrowers who entered repayment in 2012	10/01/2011 to 9/30/2014 10/01/2011 to 9/30/2012
2013	2016	Borrowers who entered repayment in 2013 and defaulted in 2013, 2014 or 2015 Borrowers who entered repayment in 2013	10/01/2012 to 9/30/2015 10/01/2012 to 9/30/2013
2014	2017	Borrowers who entered repayment in 2014 and defaulted in 2014, 2015 or 2016 Borrowers who entered repayment in 2014	10/01/2013 to 9/30/2016 10/01/2013 to 9/30/2014
2015	2018	Borrowers who entered repayment in 2015 and defaulted in 2015, 2016 or 2017 Borrowers who entered repayment in 2015	10/01/2014 to 9/30/2017 10/01/2014 to 9/30/2015

# FLORIDA ATLANTIC UNIVERSITY

*The Year Ahead:  
Proposed Improvement Plan for Florida Atlantic University's  
Performance Based Funding Model Scores*

*June 18, 2014*

In the Board of Governors' Performance Based Funding Model that was released in January 2014, Florida Atlantic University (FAU) scored zero points in the following two metrics common to all universities in the State University System (SUS):

**Metric 4** - 6-year graduation rate for full- and part-time First-Time-In-College (FTIC) students; and

**Metric 5** - Academic progress rate, which is measured by the 2nd year retention of students with at least a 2.0 grade point average.

Moving forward under the direction of newly-appointed President John Kelly, Florida Atlantic University intends to place strategic emphasis on improving these metrics, both of which can be classified under the category of "student success."

FAU's current vision is to be a university known for excellent and accessible undergraduate and graduate education, as well as an institution distinguished for the quality of its programs across multiple campuses. This vision can only be attained through a thoughtful and robust plan to promote student success. Accordingly, FAU developed short-term and long-term strategies related to the graduation and retention rates of its baccalaureate students. These actionable strategies will be presented in this document, along with specific, measurable targets associated with each goal.

In 2013, FAU renewed its focus on student success. On November 1, Provost Gary Perry appointed an Assistant Provost for Student Success, who subsequently created a university-wide task force with subcommittees on data & analysis, program-specific plans of study for undergraduates, early warning for students approaching critical milestones, and communications. These groups were to be led by a steering committee that reviewed and audited recommendations for student success. As a result of this initiative, FAU will soon introduce a number of high-impact techniques and national best practices to decrease time-to-completion for students, which will be detailed in the final report of the task force due this semester in summer 2014.

## **The Goal of Promoting Student Success**

The prominent, overarching goal of FAU for the 2014-2015 academic year will be to enrich the educational experience in a manner that will support an organizational culture in which all units are dedicated to student success. This goal emerged as one of particular importance in FAU's 2012-2017 Strategic Plan, entitled *Making Waves: Celebrating and Cultivating Discovery, Diversity, and Distinction*. Specifically, the basis for this plan is located in Goal I, Objective D of this FAU Board of Trustees-approved document.

## The Year Ahead – Strategies and Rationale

An increase in FAU's standings in the above-specified SUS metrics would result in achieving this broad goal to promote student success. It should be noted that a short-term increase in retention would likely coincide with long-term increases in graduation rates, and the identified strategies might accomplish dual objectives. Therefore, it would be appropriate for these two SUS metrics of *6-year graduation rate* and *2nd-year retention rate* to serve as a single institutional objective for the coming year.

Per the tables below, specific actionable strategies will be implemented with measurable targets, in order to accomplish this objective of *promoting student success*.

### A. Increase the number of academic advisors

Deadline	December 2014	May 2015
Target	Hire 13 new academic advisors	Hire 13 additional academic advisors
Measurement	Number of new academic advisors hired	Number of new additional academic advisors hired
Expectation	13 new academic advisors are hired and strategically placed in FAU's University Advising Services (5) as well as FAU's colleges and departments (8)	13 additional new academic advisors are hired and strategically placed in FAU's University Advising Services (5) as well as FAU's colleges and departments (8)

Rationale: Hiring a total of 26 academic advisors in the next year would enable FAU to achieve 300 students to 1 advisor ratio, which is recommended by the National Academic Advising Association. This ratio represents the minimum number of advisors that is adequate for offering students the personal connection to the institution. Studies indicate that these personal connections are vital to retention and success (Nutt, 2010)

**B. Purchase and implement advising software**

<b>Deadline</b>	<b>December 2014</b>	<b>May 2015</b>
<b>Target</b>	Select and purchase advising software	Implement new advising software package
<b>Measurement</b>	Advising software purchasing process completed	Advising software implemented and functional for use
<b>Expectation</b>	Starfish advising software is installed on university servers.  Training is coordinated	100% of advisors (83) are trained and using new advising system with students

Rationale: FAU currently has no campus-wide advising software in place. Individual units have maintained their own software, and some units have maintained advising notes on paper only. The purchase of new software will enable us to do the following.

1. Create a more seamless advising system. Notes about students in their first two years that are kept by the central advising office will be visible to advisors within the academic units. This will facilitate a global understanding of the students' strengths and areas that require improvement.
2. Monitor participation in tutoring sessions and Supplemental Instruction, which is an integral component of the advising software. Advisors will be able to see the extent to which students have availed themselves of academic support services and better monitor those who have not followed the recommendations of advisors.
3. Identify at-risk students. Faculty will use the system to identify students at risk. The system also links to Blackboard, where many faculty members maintain students' grades. Advisors can use the information to commence an intervention program with the student.
4. Monitor the success of advisors in working with students. Advising units will be asked to meet metrics (meetings with students, meeting with students deemed at risk, etc.) deemed necessary to improve student retention and timely graduation.

**C. Launch “Jump Start” pilot for undergraduates admitted in summer**

<b>Deadline</b>	<b>December 2014</b>	<b>May 2015</b>
<b>Target</b>	First cohort will have completed summer portion of pilot and initiated special advising process	First cohort will have received special advising, and FAU will conduct assessment of program
<b>Measurement</b>	Number of students in first cohort who have completed summer portion of pilot and initiated special advising process	Number of students in first cohort who have completed spring semester with at least 2.0 GPA  Assessment of program completed
<b>Expectation</b>	125 Students have completed summer portion of pilot and initiated special advising process	50% of the 125 students are retained and complete spring semester with at least 2.0 GPA or higher

Rationale: Currently, 30 percent of FAU freshmen enter the second year with a GPA below 2.0. The Jump Start program, which focuses on first-year students, is modeled closely after FAU’s successful Academic and Career Enhancement for Second-Year Students (AcCESS) program, which works with at-risk students in the sophomore year. Over 70 percent of AcCESS students are retained. Jump Start students become part of a summer learning community. Data has also shown that students in learning communities outperform students who do not participate in such communities.

Jump Start targets at-risk freshmen admitted for the summer term. They are enrolled in specific courses and receive intrusive advising and tutoring support. The intrusive advising is continued into the fall and spring semesters, ensuring that these students are on a firm path to success. Students (including those not in the Jump Start program) ending their spring term with a GPA below a 2.0 will be invited to enroll in summer classes to bring up their GPA. These students will also receive the academic support and intrusive advising necessary to ensure their success and continuation at FAU.



**D. Develop study plans for undergraduates, also known as “Flight Plans”**

<b>Deadline</b>	<b>December 2014</b>	<b>May 2015</b>
<b>Target</b>	Develop draft Flight Plan templates for all baccalaureate degree programs	Develop individualized Flight Plans for all enrolled 2014-2015 FTIC students
<b>Measurement</b>	Percentage of baccalaureate programs with completed Flight Plan templates	Percentage of baccalaureate programs with completed Flight Plans templates
<b>Expectation</b>	65% (64 of 98) of baccalaureate programs have completed Flight Plan templates	100% of baccalaureate programs completed Flight Plans for all enrolled 2014-15 FTIC students

Rationale: Students need step-by-step roadmaps and intrusive guidance to on-time completion. Such tools save students time and money and significantly boost their success. National models for guided pathways to success have resulted in positive outcomes (Complete College America, 2012). Similarly, a recent report on undergraduate trends in enrollment management cites “tracking persistence and progression patterns, term by term, for all students who matriculate” as the most effective internal operations strategy for four-year public universities (Noel-Levitz, 2013). At FAU, these Flight Plans will enable advisors to track student progression through a program, as well as notify advisors and students when they have deviated from their plans.

**E. Launch bachelors of general studies degree program**

<b>Deadline</b>	<b>December 2014</b>	<b>May 2015</b>
<b>Target</b>	Approval of new degree program by FAU Faculty Senate Committees	Approval of new degree program by FAU Board of Trustees
<b>Measurement</b>	Initiated approval process for new degree program with FAU Faculty Senate Committees	Initiated new degree program approval by FAU Board of Trustees
<b>Expectation</b>	Initiated approval process for new degree program with FAU Faculty Senate	Bachelors of General Studies approved as active degree program by FAU Board of Trustees

Rationale: A general studies degree program would offer persisting students an option to obtain a degree in a variety of concentrations. In the spring 2014 semester, 14% of FAU's student body consisted of registered undergraduates who had already earned 120 credit hours or more. This is an opportunistic degree program that will be crafted almost entirely from existing resources, with only modest resources needed for advising.

These persisting students would be well-served by the creation of a new degree program for those who might have struggled with academic progress within their original field of choice, which could broaden and enhance career opportunities. Florida Education and Training Placement Information Program (FETPIP) data shows that, for bachelor's graduates from Florida public universities, general studies resulted in the fifth-highest percentage of full-time employment in the state (SUS, 2013).

#### **F. Launch "Major KnOWLedge" early career exploration module**

<b>Deadline</b>	<b>December 2014</b>	<b>May 2015</b>
<b>Target</b>	First cohort will have completed module	Assess early career exploration module
<b>Measurement</b>	Number of students in first cohort who have completed module	Assessment of early career exploration module completed
<b>Expectation</b>	400 students have fully completed module	75% of 400 students have declared a major, remainder referred to SLS 1301  Full assessment of early career exploration module completed

Rationale: This module will help all incoming undecided students to determine majors and subsequently decrease time-to-degree and increase degree completion. Students take the module before their first term at FAU. The central advising office will follow this up with a newly developed program, Owl Nation Exploration (ONE). With the ONE program, advisors will work closely with undecided students in getting them focused on a major and possible career. Those students still undecided at the end of their first semester will be required to take a 1-credit course, SLS 1301 - Career and Life Planning. These career exploration programs are needed for the following reasons:

1. Career and major indecision is a major factor behind the attrition of FAU students in their first and second years. FAU loses over 75 percent of those undecided entering freshmen who are still undecided by the end of the second year.



2. FAU also loses a large number of students in pre-majors who are unable to obtain access to their majors of choice. Of the 262 pre-business majors entering in fall 2010, 34 were no longer registered students in fall 2012. These students need to be directed earlier into other majors, which they can choose with the help of the Major KnOWLedge module.

### **Sustainability and Assessment**

FAU is currently conducting a review of its institutional strategic plan. In the future, student success will continue to play a major role in the strategic plan. Measurable goals will be created that will ensure the long-term viability of the initiatives contained within this document. This process will require extensive consultation with faculty, staff, students, and the community.

The institution embraces accountability measures and supports the philosophy behind the SUS Performance Based Funding Model. FAU is proud of its successes in terms of job and graduate school placement for its graduates, as well as the salaries of its alumni. The institution looks forward to identifying and removing barriers to graduation, in order to ensure that even more of our bachelor's degree graduates will succeed in their careers in the state of Florida.

### **References**

Complete College America (2012). Strategies: Guided Pathways to Success.  
[www.completecollege.org/strategies](http://www.completecollege.org/strategies).

Noel-Levitz (2013). 2013 Student Retention and College Completion Practices Report for Four-Year and Two-Year Institutions. *Noel-Levitz Report on Undergraduate Trends in Enrollment Management*.

Nutt, C.L. (2010). Stand Up and Become the Key Advocate for Student Success and Academic Advising on Campus and Around the Globe!. *Academic Advising Today* 33 (2).

State University System (2013). System Summary of Post-Graduation Employment Outcomes. Board of Governors staff analysis. FETPIP data for 2011-12 Bachelor's Graduates.

# USF System 2014-15 Work Plan



**University of South Florida System**

*Work Plan Presentation for 2014-15 Board of Governors Review*

STATE UNIVERSITY SYSTEM *of* FLORIDA | **Board of Governors**



## INTRODUCTION

*The State University System of Florida has developed three tools that aid in guiding the System's future.*

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

*These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.*

*The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.*

*Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.*



## TABLE OF CONTENTS

### **1. STRATEGY**

- a. Mission Statement
- b. Vision Statement
- c. Statement of Strategy
- d. Strengths and Opportunities
- e. Key Initiatives & Investments

### **2. PERFORMANCE BASED FUNDING METRICS**

### **3. PREEMINENT RESEARCH UNIVERSITY METRICS**

### **4. OTHER KEY PERFORMANCE INDICATORS**

- a. Goals Common to All Universities
- b. Goals Specific to Research Universities
- c. Institution Specific Goals

### **5. OPERATIONS**

- a. Fiscal Information (*includes Tuition Differential Fee Request*)
- b. Enrollment Planning
- c. Academic Program Coordination

### **6. DEFINITIONS**



## MISSION STATEMENT *(What is your purpose?)*

The University of South Florida System, which includes the research-intensive USF Tampa, USF St Petersburg, and USF Sarasota-Manatee, catalyzes and coordinates initiatives that develop graduates for 21<sup>st</sup> century careers; advances research, scholarship, and creative endeavors to improve the quality of life; and engages its communities across the Tampa Bay region for mutual benefits.

## VISION STATEMENT *(What do you aspire to?)*

The University of South Florida System will unite its institutions into a system that is nationally recognized for innovation in teaching and research, for attracting outstanding and diverse scholars, staff, and students, and for leveraging its institutions' strengths to make a positive impact on the Tampa Bay region and beyond.

## STATEMENT OF STRATEGY *(How will you get there?)*

*Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.*

The institutions of the USF System develop missions and strategic plans that best fit the communities they serve while also working together to achieve synergies and economies of scale. Under the leadership of the USF Board of Trustees the USF System embraces accountability, relying on a detailed dashboard to track key metrics such as graduation rates, retention rates, research support and faculty awards that are also key components of the Board of Governors' Strategic Plan, including performance and preeminence metrics. Engaging in partnerships represents another important strategy; USF and USF St Petersburg are both recognized by the Carnegie Foundation as community engaged universities.

USF, the doctoral research campus in Tampa, is classified by Carnegie as a very high research university, attracting students and faculty of the highest caliber from across the world. The institution is working hard to position itself for AAU eligibility as it maintains a commitment to student success, entrepreneurship and innovation, and global engagement. USF's strategy is rooted in accountability: setting clear goals and constantly monitoring progress.

USF St Petersburg is developing a new strategic plan for 2014-19, which will focus on faculty research and scholarship, student performance and strategic partnerships at the local, regional and global levels. Success will be continually monitored using metrics such as students' academic performance, faculty excellence, graduation and retention rates, employment rates and external funding.

USF Sarasota-Manatee's strategy focuses on developing partnerships with the Florida College System, expanding lower-level coursework, and growing degree programs to meet local and state needs. Targeted students include FCS transfers, returning adult students and local high school graduates who

## STRENGTHS AND OPPORTUNITIES *(within 3 years)*

*What are your core capabilities, opportunities and challenges for improvement?*



The core capabilities of the USF System represent the varied strengths of its three distinctive and complementary member institutions. They include: high-impact scholarship and research; excellence in teaching and learning; entrepreneurial spirit, partnerships and innovation; focus on accountability and data driven decision making; community engagement and public service. All three institutions are dedicated to student success, and students in the USF System benefit from having an array of course options across Tampa Bay. Programs hosted at one System institution are available to all USF System students.

The challenges for the main USF doctoral research campus include maintaining current momentum in student success and institutional quality with limited resources, as the university is working to increase budgetary efficiencies and hold down costs for students. Furthermore, reduced federal research funds may impact future research opportunities. Despite those challenges, the USF System is once again a top performer in the BOG's performance funding model and is looking forward to returning those new funds into key areas that will continue to enhance quality.

The regional institutions, USF St Petersburg and USF Sarasota-Manatee, pride themselves on offering students an intimate campus experience and a high level of student-faculty interaction. At the same time, they benefit from brand associations, efficiencies of shared resources and opportunities for collaboration. Both are developing successful STEM programs that address local and statewide workforce needs and play an important role in regional economic development. At USFSP, challenges include growing needs for teaching and laboratory space as STEM programs prosper and enhancing student success to improve graduation and retention rates. For USFSM, the primary challenge is exploring ways to keep students engaged on campus without on-campus housing options.

## KEY INITIATIVES & INVESTMENTS *(within 3 years)*

*Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.*

1. Continue to improve student success, particularly in the areas of retention and graduation, by strategic reallocation of resources. Initiatives include enhancing academic advising; building on-campus housing; improving and expanding facilities such as classrooms, laboratories, studios, and libraries; enhancing the technology infrastructure; reinventing the organizational structure; infusing a global focus into the curriculum; expanding online learning; and enhancing internship opportunities and career services. The USF System is also working together in this realm with the University of Central Florida and Florida International University to share best student success practices and leverage the unique strengths as large, diverse, metropolitan universities. The universities have already jointly developed several strategies for improving the graduation rates, retention rates, and academic success of their unique metropolitan student populations by sharing knowledge, software and processes. They have also begun developing a shared database for student internship or job opportunities that may exist in Tampa, Orlando and Miami.



2. Build high-impact research and innovation and enhance academic program quality through strategic hiring of research-productive faculty; support for interdisciplinary initiatives that address critical problems, such as USF's focus on cybersecurity, which draws from the Colleges of Arts and Sciences, Behavioral and Community Sciences, Business, Education, Engineering, Global Sustainability, Public Health, the Office of Research and Innovation, and the Center for Urban Transportation; and development of local and global partnerships. Support innovators among both faculty and students and facilitate enhancement of the student experience through increased opportunities for faculty mentorship.

3. Implement fiscal management practices that increase transparency, such as a recent transition toward responsibility-centered budgeting, maximize efficiencies through shared services across the USF System, and encourage prudent use of resources. Apply strategic resource reallocations to support identified priorities related to student success, faculty research and innovation, infrastructure improvement, etc.





## PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Metrics Common To All Universities</b>						
<b>Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation</b>	0%Δ	69%	72%	73%	74%	74%
<b>Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation</b>	4%Δ	\$34,600	\$34,730	\$35,191	\$35,659	\$36,133
<b>Average Cost per Bachelor's Degree</b> [Instructional Costs to the University]	5%Δ	\$24,340	\$24,583	\$24,829	\$25,078	\$25,328
<b>FTIC 6 year Graduation Rate</b> [Includes full- and part-time students]	7%Δ	61%	63%	65%	61%	66%
<b>Academic Progress Rate</b> [FTIC 2 year Retention Rate with GPA>2 ]	1%Δ	86%	87%	87%	88%	89%
<b>University Access Rate</b> [Percent of Fall Undergraduates with a Pell grant]	0%Δ	41%	41%	41%	41%	41%
<b>Bachelor's Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	1%Δ	50%	50%	51%	52%	53%
<b>Graduate Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	2%Δ	67%	67%	68%	69%	70%
<b>Board of Governors Choice Metric</b>						
<b>Percent of Bachelor's Degrees Without Excess Hours</b>	n/a	52%	54%	56%	58%	60%
<b>Board of Trustees Choice Metric</b>						
<b>Number of Post-doctoral Appointees</b>	-4%Δ	289	320	330	335	340

Note: Metrics are defined in appendix.



### PREEMINENT RESEARCH UNIVERSITY FUNDING METRICS

The Board of Governors shall designate each state research university that meets at least 11 of the 12 following academic and research excellence standards as a preeminent state research university. For this year, the University of Florida and Florida State University are the only universities required to complete the table below. The Board of Governors will consider the shaded 2014 actual data for approval.

#### REPORTED FOR USF TAMPA ONLY

University of South Florida (Carnegie RU/VH)	BENCH- MARKS	2014 ACTUAL	2015 GOALS	2016 GOALS	2017 GOALS	2018 GOALS
<b>Average GPA and SAT Score</b> for incoming freshman in Fall semester	<b>4.0 GPA 1800 SAT</b>	Fall 2013 4.0/1772	Fall 2014 4.05/1780	Fall 2015 4.05/1800	Fall 2016 4.075/1803	Fall 2017 4.1/1806
<b>Public University National Ranking</b> (in more than one national ranking)	<b>Top 50</b>	4/2014 1	4/2015 1	4/2016 2	4/2017 2	4/2018 2
<b>Freshman Retention Rate</b> (Full-time, FTIC)	<b>90%</b>	2011-12 87%	2012-13 89%	2013-14 90%	2014-15 91%	2015-16 92%
<b>6-year Graduation Rate</b> (Full-time, FTIC)	<b>70%</b>	2007-13 63%	2008-14 65%	2009-15 68%	2010-16 63%	2011-17 70%
<b>National Academy Memberships</b>	<b>6</b>	2011 3	2012 3	2013 4	2014 5	2015 6
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	<b>\$200 M</b>	2012-14 \$410 M	2013-14 \$414 M	2014-15 \$418 M	2015-16 \$422 M	2016-17 \$426 M
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	<b>\$150 M</b>	2012-13 \$192 M	2013-14 \$194 M	2014-15 \$196 M	2015-16 \$198 M	2016-17 \$200 M
<b>National Ranking in S.T.E.M. Research Expenditures</b> (includes public & private institutions)	<b>Top 100</b> in 5 of 8 disciplines	2011-12 5	2012-13 7	2013-14 7	2014-15 8	2015-16 8
<b>Patents Awarded</b> (over 3 year period)	<b>100</b>	2011-13 265	2012-14 251	2013-15 231	2014-16 234	2015-17 237
<b>Doctoral Degrees Awarded Annually</b> (Does not include Professional degrees)	<b>400</b>	2012-13 295	2013-14 315	2014-15 330	2015-16 340	2016-17 350
<b>Number of Post-Doctoral Appointees</b>	<b>200</b>	Fall 2010 293	Fall 2011 300	Fall 2012 289	Fall 2013 322	Fall 2014 330
<b>Endowment Size (\$M)</b>	<b>\$500 M</b>	2012-13 \$364 M	2013-14 \$390 M	2014-15 \$420 M	2015-16 \$450 M	2016-17 \$485 M
<b>NUMBER OF METRICS ABOVE THE BENCHMARK</b>	<b>11 of 12</b>	<b>5</b>	<b>5</b>	<b>8</b>	<b>8</b>	<b>10</b>



## KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'<sup>1</sup>, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

---

<sup>1</sup> The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).



## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Common to All Universities

#### Academic Quality

##### National Ranking for University and Programs

USF will (a) Educate competitive, highly-skilled students ready to enter the workforce (including investment in STEM and ranked programs, such as in the growing field of cybersecurity); (b) Engage in high impact research and innovation to improve health and foster positive societal change; and (c) Establish partnerships to enhance student access to academic programs and research to build a strong, sustainable future for Florida in a global economy.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>SAT Score</b> [for 3 subtests]	5%Δ	1759	1760	1760	1765	1770
<b>High School GPA</b>	6%Δ	3.89	4.00	4.00	4.00	4.00
<b>Professional/Licensure Exam First-time Pass Rates<sup>1</sup></b>						
Exams Above Benchmarks	n/a	5	4	5	6	6
Exams Below Benchmarks	n/a	0	1	0	0	0
<b>Operational Efficiency</b>						
<b>Freshman Retention Rate</b>	1%Δ	87%	88%	88%	89%	90%
<b>FTIC Graduation Rates</b>						
In 4 years (or less)	17%Δ	40%	41%	43%	45%	46%
In 6 years (or less)	16%Δ	61%	63%	65%	64%	66%
<b>AA Transfer Graduation Rates</b>						
In 2 years (or less)	1%Δ	27%	28%	29%	30%	31%
In 4 years (or less)	6%Δ	66%	67%	68%	69%	70%
<b>Average Time to Degree (for FTIC)</b>	2%Δ	5.1 yrs	5.1 yrs	5.0 yrs	5.0 yrs	5.0 yrs
<b>Return on Investment</b>						
<b>Bachelor's Degrees Awarded</b>	19%Δ	8,999	9,269	9,400	9,600	9,800
<b>Percent of Bachelor's Degrees in STEM</b>	5%Δ	23%	25%	27%	28%	30%
<b>Graduate Degrees Awarded</b>	11%Δ	3,209	3,300	3,400	3,500	3,600
<b>Percent of Graduate Degrees in STEM</b>	8%Δ	26%	26%	27%	28%	28%
<b>Annual Gifts Received (\$M)</b>	7%Δ	\$ 36.5 M	\$ 38.0 M	\$ 40.0 M	\$ 42.0 M	\$ 44.0 M
<b>Endowment (\$M)</b>	32%Δ	\$ 363.9 M	\$ 390.0 M	\$ 420.0 M	\$ 450.0 M	\$ 485.0 M

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.



## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Specific to Research Universities

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Academic Quality</b>						
Faculty Awards	-13%Δ	7	8	9	10	11
National Academy Members	0%Δ	3	4	5	6	7
Number of Post-Doctoral Appointees*	25%Δ	289	320	330	335	340
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures*	n/a	7 of 8	7 of 8	8 of 8	8 of 8	8 of 8
<b>Return on Investment</b>						
Total Research Expenditures (\$M) [includes non-Science & Engineering disciplines]	16%Δ	\$ 467 M	\$ 472 M	\$ 477 M	\$ 482 M	\$ 487 M
Science & Engineering Research Expenditures (\$M)	19%Δ	\$ 411 M	\$ 415 M	\$ 419 M	\$ 423 M	\$ 427 M
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences (\$M)	41%Δ	\$ 193 M	\$ 195 M	\$ 197 M	\$ 199 M	\$ 201 M
Percent of Research Expenditures funded from External Sources	-14%Δ	64%	63%	62%	61%	60%
Patents Issued	171%Δ	76	77	78	79	80
Licenses/Options Executed	200%Δ	75	76	77	78	79
Licensing Income Received (\$M)	38%Δ	\$ 1.8 M	\$ 1.5 M	\$ 1.6 M	\$ 1.7 M	\$ 1.8 M
Number of Start-up Companies	200%Δ	9	8	8	9	9
National Rank is Higher than Predicted by the Financial Resources Ranking [based on U.S. News & World Report]	n/a	<u>170</u> 168	n/a	n/a	n/a	n/a
Research Doctoral Degrees Awarded	19%Δ	295	315	330	340	350
Professional Doctoral Degrees Awarded	-1%Δ	153	235	265	330	282
<b>TOTAL NUMBER OF IMPROVING METRICS</b>		<b>9</b>	<b>11</b>	<b>13</b>	<b>13</b>	<b>13</b>

Note: An asterisk (\*) indicates that 2011-12 is the latest data available for these metrics.



## KEY PERFORMANCE INDICATORS

### Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

**SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS**



## FISCAL INFORMATION

## University Revenues (in Millions of Dollars)

	2013-14 Actual	2014-15 Appropriations
<b>Education &amp; General – Main Operations</b>		
State Funds *	\$240.4	\$274.9
Tuition	\$194.6	\$222.1
<b>TOTAL MAIN OPERATIONS</b>	<b>\$ 435.0</b>	<b>\$497.1</b>
<b>Education &amp; General – Health-Science Center / Medical Schools</b>		
State Funds	\$71.8	\$74.4
Tuition	\$53.2	\$56.7
<b>TOTAL HSC</b>	<b>\$125.0</b>	<b>\$131.1</b>
<b>EDUCATION &amp; GENERAL TOTAL REVENUES</b>	<b>\$560.0</b>	<b>\$628.2</b>

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.

\*The 2014-15 appropriations data includes the funds associated with the Performance Based Funding model, which is contingent upon approval by the Board of Governors at their June Board meeting. The entire USF System allocation is included in the Main Operations, State Funds line – allocation to the USF System Budget Entities has not yet been determined.

## OTHER BUDGET ENTITIES

**Auxiliary Enterprises**

Resources associated with auxiliary units that are self-supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues	\$187.3	n/a
----------	---------	-----

**Contracts & Grants**

Resources received from federal, state or private sources for the purposes of conducting research and public service activities.

Revenues	\$376.4	n/a
----------	---------	-----

**Local Funds**

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues	\$444.5	n/a
----------	---------	-----

**Faculty Practice Plans**

Revenues/receipts are funds generated from faculty practice plan activities.

Revenues	\$210.4	n/a
----------	---------	-----

**OTHER BUDGET ENTITY TOTAL REVENUES****\$1,218.6****n/a****UNIVERSITY REVENUES GRAND TOTAL****\$1,778.6****n/a**





## FISCAL INFORMATION (continued)

## Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition					
Tuition Differential Fee					
Percent Increase					
Required Fees <sup>1</sup>					
<b>TOTAL TUITION AND FEES</b>					

Data cannot be rolled up into one reporting instance for the USF System.  
See individual USF System institution work plans.

Note<sup>1</sup>: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

## Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	52%	53%	57%	59%	59%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$21,811	\$21,784	\$22,623	\$22,719	\$22,700
NSLDS Cohort Year	2008	2009	2010	2011	2012 Goal
Student Loan Cohort Default Rate (3rd Year)	8.1% trial	10.1%	9.8%	7.5% draft	7.0%

## Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$6,410	\$1,000	\$9,250	\$1,600	\$2,500	\$20,760
AT HOME	\$6,410	\$1,000	\$4,620	\$1,600	\$2,500	\$16,130

## Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	7,314	36%	\$11,383	-\$2,720	\$8,556	\$4,180
\$40,000-\$59,999	2,520	13%	\$13,271	-\$544	\$6,489	\$3,635
\$60,000-\$79,999	1,910	10%	\$15,502	\$1,960	\$4,022	\$4,397
\$80,000-\$99,999	1,626	8%	\$16,324	\$2,729	\$3,267	\$4,254
\$100,000 Above	4,834	24%	\$16,515	\$2,911	\$3,110	\$3,114
Missing*	1,805	9%	n/a	\$4,629	\$1,281	\$162
<b>TOTAL</b>	<b>20,009</b>	<b>100%</b>	<b>AVERAGE</b>	<b>\$14,221*</b>	<b>\$484</b>	<b>\$5,461</b>
					<b>\$5,461</b>	<b>\$3,518</b>

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note\*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



**FISCAL INFORMATION (continued)**  
**TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014**

**SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS**



**FISCAL INFORMATION (continued)**  
**TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION**

**SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS**



**FISCAL INFORMATION (continued)  
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,  
& AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15**

**SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS**



**FISCAL INFORMATION (continued)**  
**UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS**

**SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS**

**ENROLLMENT PLANNING**



### Planned Enrollment Growth by Student Type *(for all E&G students at all campuses)*

	5 YEAR TREND (2008-13)	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	1%Δ	17,041	47%	17,030	49%	17,226	49%	17,423	50%
FTIC (Profile Admit)	-56%Δ	154	0%	135	0%	128	0%	110	0%
AA Transfers*	17%Δ	12,489	35%	12,043	34%	11,969	34%	11,697	34%
Other Transfers	-13%Δ	6,326	18%	5,812	17%	5,708	16%	5,541	16%
Subtotal	3%Δ	36,010	100%	35,020	100%	35,031	100%	34,771	100%
GRADUATE STUDENTS									
Master's	4%Δ	6,806	69%	7,002	70%	7,105	70%	7,179	70%
Research Doctoral	12%Δ	2,294	23%	2,340	24%	2,375	23%	2,400	23%
Professional Doctoral	554%Δ	739	8%	600	6%	700	7%	700	7%
Subtotal	13%Δ	9,839	100%	9,942	100%	10,180	100%	10,279	100%
NOT-DEGREE SEEKING	-4%Δ	1,984		2,132		2,138		2,144	
MEDICAL	5%Δ	496		496		496		496	
TOTAL	4%Δ	48,329		47,590		47,845		47,690	

Note\*: AA transfers refer only to transfers from the Florida College System.

### Planned Enrollment Growth by Method of Instruction *(for all E&G students at all campuses)*

	2 YEAR TREND (2010-11 to 2012-13)	2012-13		2014-15		2015-16		2016-17	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
<b>UNDERGRADUATE</b>									
DISTANCE (>80%)	11%Δ	5,072	21%	5,617	22%	5,687	23%	5,748	23%
HYBRID (50%-79%)	13%Δ	382	2%	743	3%	859	3%	878	100%
TRADITIONAL (<50%)	-2%Δ	18,776	77%	18,800	75%	18,764	74%	18,854	74%
<b>TOTAL</b>	<b>1%Δ</b>	<b>24,230</b>	<b>100%</b>	<b>25,160</b>	<b>100%</b>	<b>25,310</b>	<b>100%</b>	<b>25,480</b>	<b>100%</b>
<b>GRADUATE</b>									
DISTANCE (80%)	-2%Δ	1,116	20%	1,300	22%	1,472	23%	1,476	23%
HYBRID (50%-79%)	1%Δ	110	2%	190	3%	219	3%	221	3%
TRADITIONAL (<50%)	-1%Δ	4,268	78%	4,491	75%	4,783	74%	4,793	74%
<b>TOTAL</b>	<b>-1%Δ</b>	<b>5,494</b>	<b>100%</b>	<b>5,981</b>	<b>100%</b>	<b>6,474</b>	<b>100%</b>	<b>6,490</b>	<b>100%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).



## ENROLLMENT PLANNING (continued)

### Planned Enrollment Plan by Residency and Student Level *(Florida FTE)*

	Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*
<b>STATE FUNDABLE</b>									
<b>Florida Resident</b>									
LOWER	8721	9274	8671	8694	8852	9021	9135	9252	1%
UPPER	13821	12283	13510	13251	12966	12816	13024	13239	0%
GRAD I	3222	3081	3234	3310	3440	3524	3651	3783	3%
GRAD II	918	623	998	1067	1167	1254	1299	1346	6%
<b>TOTAL</b>	<b>26,681</b>	<b>25,261</b>	<b>26,414</b>	<b>26,322</b>	<b>26,425</b>	<b>26,615</b>	<b>27,109</b>	<b>27,619</b>	<b>1%</b>
<b>Non- Resident</b>									
LOWER	819	n/a	1031	1244	1266	1288	1301	1315	5%
UPPER	687	n/a	772	853	832	817	827	838	2%
GRAD I	760	n/a	901	1077	1120	1145	1186	1228	7%
GRAD II	664	n/a	780	900	984	1058	1096	1136	8%
<b>TOTAL</b>	<b>2,930</b>	<b>1,302</b>	<b>3,484</b>	<b>4,074</b>	<b>4,201</b>	<b>4,309</b>	<b>4,410</b>	<b>4,517</b>	<b>6%</b>
<b>TOTAL</b>									
LOWER	9540	9274	9702	9938	10118	10309	10436	10567	2%
UPPER	14507	12283	14282	14104	13798	13633	13851	14076	0%
GRAD I	3982	3081	4135	4387	4560	4669	4837	5011	4%
GRAD II	1582	623	1778	1967	2151	2312	2395	2482	7%
<b>TOTAL</b>	<b>29,611</b>	<b>26,563</b>	<b>29,898</b>	<b>30,396</b>	<b>30,627</b>	<b>30,923</b>	<b>31,519</b>	<b>32,135</b>	<b>2%</b>
<b>NOT STATE FUNDABLE</b>									
LOWER	701	n/a	728	755	783	813	843	875	4%
UPPER	918	n/a	952	987	1,023	1,060	1,099	1,140	4%
GRAD I	387	n/a	402	418	434	450	467	486	4%
GRAD II	7	n/a	7	8	8	8	9	9	5%
<b>TOTAL</b>	<b>2,014</b>	<b>n/a</b>	<b>2,088</b>	<b>2,168</b>	<b>2,248</b>	<b>2,330</b>	<b>2,418</b>	<b>2,509</b>	<b>4%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note\*: The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.

### Medical Student Headcount Enrollments

#### Medical Doctorate Headcounts

RESIDENT	468	480	480	480	480	480	480	480	0%
NON-RESIDENT	16	0	16	16	16	16	16	16	0%
<b>TOTAL</b>	<b>496</b>	<b>480</b>	<b>496</b>	<b>496</b>	<b>496</b>	<b>496</b>	<b>496</b>	<b>496</b>	<b>0%</b>





## ACADEMIC PROGRAM COORDINATION

### New Programs For Consideration by University in AY 2014-15

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						

### MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS

Master of Pharmacy (USF)	51.2099	STEM	FAMU, UF	80% online	100	Fall 2014
MS in Nurse Anesthesia (USF)	51.3804		FIU		35	Fall 2015
MS in Health Systems Engineering (USF)	14.2701	STEM	UF		40	Fall 2015
Master of Accountancy (USFSP)	52.0301	Critical Workforce Gap Analysis	UF, FSU, FAU, FIU, UCF, UNF	No	45	September 2014

### DOCTORAL PROGRAMS

### New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Data Analytics (USFSP)	52.1301	Economic Development--STEM		UF		March 2016

### MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS

### DOCTORAL PROGRAMS

Ph.D. in Global Sustainability (USF)	30.3301	STEM		Hybrid	24	Fall 2016
--------------------------------------	---------	------	--	--------	----	-----------



## DEFINITIONS

### Performance Based Funding

#### Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation

This metric is based on the percentage of a graduating class of bachelor's degree recipients who are employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded.

Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation.

Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

#### Median Wages of Bachelor's Graduates Employed Full-time in Florida One Year After Graduation

This metric is based on annualized Unemployment Insurance (UI) wage data from the fourth fiscal quarter after graduation for bachelor's recipients. UI wage data does not include individuals who are self-employed, employed out of state, employed by the military or federal government, those without a valid social security number, or making less than minimum wage. Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

#### Average Cost per Bachelor's Degree

*Instructional costs to the university*

For each of the last four years of data, the annual total undergraduate instructional expenditures were divided by the total fundable student credit hours to create a cost per credit hour for each year. This cost per credit hour was then multiplied by 30 credit hours to derive an average annual cost. The average annual cost for each of the four years was summed to provide an average cost per degree for a baccalaureate degree that requires 120 credit hours. Sources: State University Database System (SUDS), Expenditure Analysis: Report IV (2009-10 through 2012-13).

#### Six Year FTIC Graduation Rate

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Students of degree programs longer than four years (eg, PharmD) are included in the cohorts. Students who are active duty military are not included in the data.

Source: State University Database System (SUDS).

#### Academic Progress Rate

*2nd Year Retention with GPA Above 2.0*

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with had a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer).

Source: State University Database System (SUDS).

#### University Access Rate

*Percent of Undergraduates with a Pell-grant*

This metric is based the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric.

Source: State University Database System (SUDS).

#### Bachelor's Degrees Awarded within Programs of Strategic Emphasis (includes STEM)

This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).

Source: State University Database System (SUDS).

#### Graduate Degrees Awarded within Programs of Strategic Emphasis (includes STEM)

This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).

Source: State University Database System (SUDS).

**Freshmen in Top 10% of High School Class**

Applies to: NCF

Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class.

Source: New College of Florida.

**BOG Choice Metrics****Percent of Bachelor's Degrees Without Excess Hours**

This metric is based on the percentage of baccalaureate degrees awarded within 110% of the credit hours required for a degree based on the Board of Governors Academic Program Inventory.

Note: It is important to note that the statutory provisions of the "Excess Hour Surcharge" (1009.286, FS) have been modified several times by the Florida Legislature, resulting in a phased-in approach that has created three different cohorts of students with different requirements. The performance funding metric data is based on the latest statutory requirements that mandates 110% of required hours as the threshold. In accordance with statute, this metric excludes the following types of student credits (ie, accelerated mechanisms, remedial coursework, non-native credit hours that are not used toward the degree, non-native credit hours from failed, incomplete, withdrawn, or repeated courses, credit hours from internship programs, credit hours up to 10 foreign language credit hours for transfer students in Florida, and credit hours earned in military science courses that are part of the Reserve Officers' Training Corps (ROTC) program).

Source: State University Database System (SUDS).

**Number of Faculty Awards**

This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards. Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).

**National Ranking for Institutional & Program Achievements**

This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

Source: Board of Governors staff review.

**BOT Choice Metrics****Percent of R&D Expenditures Funded from External Sources**  
FAMU

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.

Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

**Bachelor's Degrees Awarded to Minorities**  
FAU, FGCU, FIU

This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code.

Source: State University Database System (SUDS).

**National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News**  
FSU

This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count.

Source: US News and World Report's annual National University rankings.



<b>Percent of Undergraduate Seniors Participating in a Research Course</b> NCF	This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year. Source: New College of Florida.
<b>Number of Bachelor Degrees Awarded Annually</b> UCF	This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once. Source: State University Database System (SUDS).
<b>Total Research Expenditures</b> UF	This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
<b>Percent of Course Sections Offered via Distance and Blended Learning</b> UNF	This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both. Source: State University Database System (SUDS).
<b>Number of Postdoctoral Appointees</b> USF	This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar. Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Percentage of Adult Undergraduates Enrolled</b> UWF	This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified. Source: State University Database System (SUDS).

#### Preeminent Research University Funding Metrics

<b>Average GPA and SAT Score</b>	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Public University National Ranking</b>	A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.
<b>Freshman Retention Rate</b> (Full-time, FTIC)	Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.
<b>6-year Graduation Rate</b> (Full-time, FTIC)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1%-2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.



<b>National Academy Memberships</b>	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of \$200 million or more, as reported annually by the National Science Foundation (NSF).
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount.
<b>National Ranking in S.T.E.M. Research Expenditures</b>	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
<b>Patents Awarded</b> (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/20100101->20131231 AND APT/1)".
<b>Doctoral Degrees Awarded Annually</b>	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report. Note: per legislative workpapers, this metric does not include Professional degrees.
<b>Number of Post-Doctoral Appointees</b>	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Endowment Size (\$M)</b>	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.





### Goals Common to All Universities

#### Academic Quality

<b>Avg. SAT Score</b> (for 3 subtests)	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Avg. HS GPA</b>	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
<b>Professional/Licensure Exam First-time Pass Rates</b>	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.

#### Operational Efficiency

<b>Freshman Retention Rate</b>	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see <a href="#">link</a> .
<b>FTIC Graduation Rates</b> In 4 years (or less) In 6 years (or less)	As reported in the 2012-13 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>AA Transfer Graduation Rates</b> In 2 years (or less) In 4 years (or less)	As reported in the 2012-13 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>Average Time to Degree (for FTIC)</b>	This metric is the number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.

#### Return on Investment

<b>Bachelor's Degrees Awarded</b>	This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).
<b>Percent of Bachelor's Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 4H).
<b>Graduate Degrees Awarded</b>	This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).
<b>Percent of Graduate Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).
<b>Annual Gifts Received (\$M)</b>	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at <a href="http://www.cae.org/vse">www.cae.org/vse</a> .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
<b>Endowment (\$M)</b>	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).

### Goals Specific to Research Universities



## Academic Quality

### Faculty Awards

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

### National Academy Members

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

### Number of Post-Doctoral appointees

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).

### Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures

The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at [link](#)), but now data must be queried via WebCASPAR – see [link](#).

## Return on Investment

### Total Research Expenditures (\$M)

Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).

### Science & Engineering Research Expenditures in non-medical/health sciences

This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see [link](#), table 36 *minus* table 52), but now data must be queried via WebCASPAR.

### Percent of R&D Expenditures funded from External Sources

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.  
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

### Patents Issued

The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).

### Licenses/Options Executed

Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).

### Licensing Income Received (\$M)

License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2012-13 Accountability Report (table 6A).

### Number of Start-up Companies

The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2012-13 Accountability Report (table 6A).

### National rank is higher than predicted by Financial Resources Ranking *based on US News & World Report*

This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.

### Research Doctoral Degrees Awarded

The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).



**Professional Doctoral Degrees Awarded**

The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

**Student Debt Summary****Percent of Bachelor's Recipients with Debt**

This is the percentage of bachelor's graduates in a given academic year who entered the university as a first-time-in-college (FTIC) student and who borrowed through any loan programs (institutional, state, Federal Perkins, Federal Stafford Subsidized and unsubsidized, private) that were certified by your institution - excludes parent loans.  
Source: Common Dataset (H4).

**Average Amount of Debt for Bachelor's who have graduated with debt**

This is the average amount of cumulative principal borrowed (from any loan program certified by the institution) for each native, FTIC bachelor's recipient in a given academic year that graduated with debt – see metric definition above. This average does NOT include students who did not enter a loan program that was certified by the institution.  
Source: Common Dataset (H5).

**Student Loan Cohort Default Rate (3rd Year)**

Student loan cohort default rate (CDR) data includes undergraduate and graduate students, and refers to the three federal fiscal year period when the borrower enters repayment and ends on the second fiscal year following the fiscal year in which the borrower entered repayment. Cohort default rates are based on the number of borrowers who enter repayment, not the number and type of loans that enter repayment. A borrower with multiple loans from the same school whose loans enter repayment during the same cohort fiscal year will be included in the formula only once for that cohort fiscal year. Default rate debt includes: Federal Stafford Loans, and Direct Stafford/Ford Loans – for more information see:

<http://ifap.ed.gov/DefaultManagement/CDRGuideMaster.html>.

Three Year CDR			
Cohort Fiscal Year	Year Published	Borrowers in the Numerator Borrowers in the Denominator	3-Yr Time Period (Numerator) 1-Yr Time Period (Denominator)
2009	2012	Borrowers who entered repayment in 2009 and defaulted in 2009, 2010 or 2011 Borrowers who entered repayment in 2009	10/01/2008 to 9/30/2011 10/01/2008 to 9/30/2009
2010	2013	Borrowers who entered repayment in 2010 and defaulted in 2010, 2011 or 2012 Borrowers who entered repayment in 2010	10/01/2009 to 9/30/2012 10/01/2009 to 9/30/2010
2011	2014*	Borrowers who entered repayment in 2011 and defaulted in 2011, 2012 or 2013 Borrowers who entered repayment in 2011	10/01/2010 to 9/30/2013 10/01/2010 to 9/30/2011
2012	2015	Borrowers who entered repayment in 2012 and defaulted in 2012, 2013 or 2014 Borrowers who entered repayment in 2012	10/01/2011 to 9/30/2014 10/01/2011 to 9/30/2012
2013	2016	Borrowers who entered repayment in 2013 and defaulted in 2013, 2014 or 2015 Borrowers who entered repayment in 2013	10/01/2012 to 9/30/2015 10/01/2012 to 9/30/2013
2014	2017	Borrowers who entered repayment in 2014 and defaulted in 2014, 2015 or 2016 Borrowers who entered repayment in 2014	10/01/2013 to 9/30/2016 10/01/2013 to 9/30/2014
2015	2018	Borrowers who entered repayment in 2015 and defaulted in 2015, 2016 or 2017 Borrowers who entered repayment in 2015	10/01/2014 to 9/30/2017 10/01/2014 to 9/30/2015

# FGCU

## 2014-15

# Work Plan



**Florida Gulf Coast University**

*Work Plan Presentation for 2014-15 Board of Governors Review*

**DRAFT - PENDING UBOT APPROVAL ON JUNE 17 2014**

STATE UNIVERSITY SYSTEM *of* FLORIDA | **Board of Governors**



## INTRODUCTION

*The State University System of Florida has developed three tools that aid in guiding the System's future.*

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

*These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.*

*The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.*

*Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.*



## TABLE OF CONTENTS

### 1. STRATEGY

- a. Mission Statement
- b. Vision Statement
- c. Statement of Strategy
- d. Strengths and Opportunities
- e. Key Initiatives & Investments

### 2. PERFORMANCE BASED FUNDING METRICS

### 3. OTHER KEY PERFORMANCE INDICATORS

- a. Goals Common to All Universities
- b. Goals Specific to Research Universities
- c. Institution Specific Goals

### 4. OPERATIONS

- a. Fiscal Information (*includes Tuition Differential Fee Request*)
- b. Enrollment Planning
- c. Academic Program Coordination

### 5. DEFINITIONS



## MISSION STATEMENT (What is your purpose?)

Established on the verge of the 21st century, Florida Gulf Coast University infuses the strengths of the traditional public university with innovation and learning-centered spirit, its chief aim being to fulfill the academic, cultural, social, and career expectations of its constituents. Outstanding faculty upholds challenging academic standards and balance research, scholarly activities, and service expectations with their central responsibilities of teaching and mentoring. Working together, faculty and staff of the University transform students' lives and the southwest Florida region. Florida Gulf Coast University continuously pursues academic excellence, practices and promotes environmental sustainability, embraces diversity, nurtures community partnerships, values public service, encourages civic responsibility, cultivates habits of lifelong learning, and keeps the advancement of knowledge and pursuit of truth as noble ideals at the heart of the university's purpose.

## VISION STATEMENT (What do you aspire to?)

Florida Gulf Coast University will achieve national prominence in undergraduate education with expanding recognition for graduate programs.

## STATEMENT OF STRATEGY (How will you get there?)

*Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.*

FGCU is a public comprehensive regional university principally serving the five-county area of Southwest Florida comprised of Charlotte, Collier, Glades, Hendry, and Lee. The university's appeal also extends to other counties in South Florida and mainly attracts traditional age undergraduates who increasingly are seeking a residential experience at an institution noted for its environmental commitment and community engagement. FGCU offers these students the opportunity to acquire a sound foundation in the liberal arts and sciences complemented by a focused education in a number of professional fields and Science, Technology, Engineering and Mathematics (STEM) disciplines. The success of this approach is reflected in the number of students who choose majors in these disciplines and in their post-graduation employment.



## STRENGTHS AND OPPORTUNITIES *(within 3 years)*

*What are your core capabilities, opportunities and challenges for improvement?*

The principal strengths of FGCU include: the success of its graduates; focus on teaching; commitment to sustainable growth; emphasis on efficiency; engagement with its community; quality of its facilities; location in the heart of Southwest Florida; potential to grow; state of the art technology; quality of its academic support resources; and regional economic impact. Our biggest challenges come from our relative youth and enhancing our visibility and reputation. FGCU continuously has made exceptional progress as a 17-year old, developing university, and has positioned itself for further growth but at a rate consistent with available resources. It is now among the most efficient universities in the SUS.

## KEY INITIATIVES & INVESTMENTS *(within 3 years)*

*Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.*

**1 Academic Quality** - academic excellence will continue as a principal institutional goal. Assessment and continuous improvement will be tools in the vanguard of FGCU's further evolution into a fully comprehensive university. Regional accreditation, state licensure/national certification, and Board of Governors (BOG) planning and accountability requirements will ensure the integrity of our academic enterprise. Specialized accreditation will be sought, earned, and maintained for all appropriate disciplines.

**2 Return on Investment** - means FGCU will increase its degree production including STEM areas to provide the educated workforce that drives economic development. Graduation rate improvement will continue to be a major focus of our efforts, and FGCU will continue to demonstrate high levels of post-graduation employment and success that will support the projected growth of the region: in health care; education; management, finance, and real estate; information technology; the resort and hospitality industry; life sciences; environmental sciences, engineering; and the professions.

**3 Operational Efficiency** - FGCU will continue to demonstrate among the lowest costs per student credit hour in the SUS. The university also will continue to employ technology to ensure conservation of energy, the generation of clean energy, and the preservation of its environment. FGCU will continue to demonstrate among the lowest energy costs per square foot in the SUS. All future facilities where possible will be constructed to Leadership in Energy and Environmental Design (LEED) standards. Classroom and laboratory utilization rates will remain among the highest within the SUS. The campus will remain a clean and secure environment conducive to student success.





PENDING BOT APPROVAL

## PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Metrics Common To All Universities</b>						
<b>Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation</b>	0%Δ	70%	70%	71%	72%	73%
<b>Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation</b>	0%Δ	\$32,900	\$33,500	\$34,000	\$34,500	\$35,000
<b>Average Cost per Bachelor's Degree</b> [Instructional Costs to the University]	-2%Δ	\$29,240	\$29,000	\$29,000	\$28,500	\$28,000
<b>FTIC 6 year Graduation Rate</b> [Includes full- and part-time students]	-1%Δ	43%	44%	45%	46%	47%
<b>Academic Progress Rate</b> [FTIC 2 year Retention Rate with GPA>2 ]	1%Δ	72%	73%	74%	75%	76%
<b>University Access Rate</b> [Percent of Fall Undergraduates with a Pell grant]	1%Δ	35%	36%	37%	38%	39%
<b>Bachelor's Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	2%Δ	44%	44%	45%	46%	47%
<b>Graduate Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	5%Δ	66%	66%	67%	68%	69%
<b>Freshmen in Top 10% of High School Graduating Class</b> [for NCF only]	NAΔ	NA%	NA%	NA%	NA%	NA%
<b>Board of Governors Choice Metric</b>						
<b>Percent of Bachelor's Degrees Without Excess Hours</b>	NA	74%	74%	75%	76%	77%
<b>Board of Trustees Choice Metric</b>						
<b>Bachelor's Degrees Awarded to Minorities</b> [FGCU UBOT Choice]	5%Δ	23%	23%	24%	25%	26%

Note: Metrics are defined in appendix.





## OTHER KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.



## OTHER KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Common to All Universities

#### Academic Quality

##### National Ranking for University and Programs

To achieve this FGCU will continue to focus on academic quality through the following: predominant use of full-time faculty providing instruction; continuous faculty development; maintenance of state-of-the-art facilities; use of technology to provide effective academic support and delivery of instruction; and the pursuit and maintenance of professional accreditation whenever possible.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>SAT Score</b> [for 3 subtests]	0%Δ	1534	1540	1550	1560	1570
<b>High School GPA</b>	3%Δ	3.4	3.4	3.5	3.6	3.7
<b>Professional/Licensure Exam First-time Pass Rates<sup>1</sup></b>						
Exams Above Benchmarks	n/a	2	3	3	3	3
Exams Below Benchmarks	n/a	1	0	0	0	0
<b>Operational Efficiency</b>						
<b>Freshman Retention Rate</b>	-2%Δ	76%	77%	78%	79%	80%
<b>FTIC Graduation Rates</b>						
In 4 years (or less)	-2%Δ	21%	22%	23%	24%	25%
In 6 years (or less)	-2%Δ	43%	44%	45%	47%	49%
<b>AA Transfer Graduation Rates</b>						
In 2 years (or less)	-3%Δ	28%	29%	30%	31%	33%
In 4 years (or less)	+3%Δ	67%	68%	69%	70%	72%
<b>Average Time to Degree (for FTIC)</b>	+3%Δ	4.6 yrs	4.6 yrs	4.5 yrs	4.4 yrs	4.3 yrs
<b>Return on Investment</b>						
<b>Bachelor's Degrees Awarded</b>	+39%Δ	1,875	1,965	2,125	2,200	2,300
<b>Percent of Bachelor's Degrees in STEM</b>	+6%Δ	19%	19%	20%	21%	22%
<b>Graduate Degrees Awarded</b>	+27%Δ	385	311	326	343	360
<b>Percent of Graduate Degrees in STEM</b>	+2%Δ	9%	9%	10%	11%	12%
<b>Annual Gifts Received (\$M)</b>	34%Δ	\$14.1 M	\$17.0 M	\$ 17.0 M	\$ 18.0 M	\$ 19.0 M
<b>Endowment (\$M)</b>	61%Δ	\$63.0 M	\$72.6 M	\$ 78.4 M	\$84.7 M	\$91.5 M

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.



## OTHER KEY PERFORMANCE INDICATORS

### Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
Bachelor's Degrees Awarded to Minorities	+116%Δ	427	450	475	500	525
Bachelor's Degrees in Areas of Strategic Emphasis	+69%Δ	835	850	950	1012	1081
Graduate Degrees in Areas of Strategic Emphasis	+61%Δ	255	205	218	233	248

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

**Goal 1.** Return on Investment: FGCU will continue to provide access to higher education to students from low socio-economic backgrounds. Between 2008-09 and 2012-13 with the exception of New College, FGCU had in the SUS the highest rate of growth in degrees awarded annually to students with Pell Grants.

Degrees Awarded to Pell recipients	+134%Δ	885	995	1100	1200	1300
------------------------------------	--------	-----	-----	------	------	------

**Goal 2.** Operational Efficiency: FGCU will continue to demonstrate among the lowest costs per student credit hour among the SUS; it also will continue to employ technology to ensure conservation of energy, the generation of clean energy, and the preservation of its environment. FGCU will optimize scheduling of classes to maximize existing physical plant usage.

Total Expenditure per Student Credit Hour	-11%Δ	\$280	\$280	\$277	\$275	\$273
---	-------	-------	-------	-------	-------	-------



PENDING BOT APPROVAL

## OPERATIONS FISCAL INFORMATION

### University Revenues *(in Millions of Dollars)*

	2013-14 Actual	2014-15 Appropriations
<b>Education &amp; General – Main Operations</b>		
State Funds	\$ 53.2	\$64.2
Tuition	\$ 54.5	\$56.5
<b>TOTAL MAIN OPERATIONS</b>	<b>\$ 107.7</b>	<b>\$120.7</b>
<b>EDUCATION &amp; GENERAL TOTAL REVENUES</b>	<b>\$ 107.7</b>	<b>\$120.7</b>

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.

### OTHER BUDGET ENTITIES

#### Auxiliary Enterprises

Resources associated with auxiliary units that are self-supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues	\$ 45.9	\$48.5
<b>Contracts &amp; Grants</b>		
Resources received from federal, state or private sources for the purposes of conducting research and public service activities.		
Revenues	\$ 14.7	\$12.9

#### Local Funds

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues	\$ 38.6	\$39.2
<b>OTHER BUDGET ENTITY TOTAL REVENUES</b>	<b>\$ 99.2</b>	<b>\$100.6</b>
<b>UNIVERSITY REVENUES GRAND TOTAL</b>	<b>\$ 206.9</b>	<b>\$221.3</b>



## FISCAL INFORMATION (continued)

## Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition	\$3,100	\$3,152	\$3,152	\$3,152	\$3,152
Tuition Differential Fee	\$1,091	\$1,091	\$1,091	\$1,091	\$1,091
Percent Increase	12%	0%	0%	0%	0%
Required Fees <sup>1</sup>	\$1,877	\$1,927	\$1,927	\$1,950	\$1,977
<b>TOTAL TUITION AND FEES</b>	<b>\$6,068</b>	<b>\$6,170</b>	<b>\$6,170</b>	<b>\$6,193</b>	<b>\$6,217</b>

Note<sup>1</sup>: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

## Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	46.20%	45%	47.10%	51.40%	50%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$16,117	\$16,710	\$17,768	\$19,538	\$19,250
Student Loan Cohort Default Rate (3rd Year)	7%	8.2%	6.3%	n/a	6%

## Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$6,318	\$1,200	\$9,424	\$1,700	\$1,700	<b>\$20,342</b>
AT HOME	\$6,318	\$1,200	\$3,364	\$1,700	\$1,700	<b>\$14,282</b>

## Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	2,099	27%	\$11,194	\$(2,112)	\$7,536	\$3,868
\$40,000-\$59,999	693	9%	\$14,043	\$703	\$4,776	\$4,195
\$60,000-\$79,999	618	8%	\$16,006	\$2,753	\$2,762	\$4,540
\$80,000-\$99,999	555	7%	\$16,370	\$3,074	\$2,421	\$4,734
\$100,000 Above	1,540	20%	\$17,042	\$3,392	\$2,163	\$4,108
Missing*	2,128	28%	n/a	\$5,489	\$0	\$0
<b>TOTAL</b>	<b>7,633</b>	<b>100%</b>	<b>AVERAGE</b> <b>\$10,278</b>	<b>\$2,143</b>	<b>\$3,342</b>	<b>\$2,985</b>

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note\*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



PENDING BOT APPROVAL

## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

Effective Date	
University Board of Trustees approval date:	N/A
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	N/A
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	N/A
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$N/A
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	N/A%
\$ Increase in tuition differential per credit hour:	\$N/A
\$ Increase in tuition differential for 30 credit hours:	\$N/A
Projected Differential Revenue Generated	
Incremental revenue generated in 2014-15 (projected):	\$N/A
Total differential fee revenue generated in 2014-15 (projected):	\$N/A
Intended Uses	
Describe how the revenue will be used. N/A	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
N/A	
Request to Modify or Waive Tuition Differential Uses (pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)	
N/A	



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2013-14 academic year.

2013-2014 - 70% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Hire more faculty and staff to keep pace with enrollment growth, add breadth and depth to academic programs; and enhance student advising.	Enrollment grew by 4.7% from fall 12 to fall 13, new faculty, staff, and advisors were hired across a variety of disciplines providing additional depth to the curriculum and assistance to students.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	58
Total Number of Advisors Hired or Retained (funded by tuition differential):	8
Total Number of Course Sections Added or Saved (funded by tuition differential):	342
2013-2014 - 30% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Provide additional need-based aid to students.	The minimum award rose from \$11 to \$250. The mean award declined slightly compared to the previous year, in part due to the tuition differential which did not change from the prior year.
Increase the number of students receiving need-based financial aid.	10% more students received need-based aid in 2013-14 over the previous year in part due to the tuition differential.
Additional Information (estimates as of April 30, 2014):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	1245
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,861.25
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$250
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$8,414.60





PENDING BOT APPROVAL

**FISCAL INFORMATION (continued)**  
**TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,**  
**& AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15**

<b>University Tuition Differential</b>			
Budget Entity: 48900100 (Educational & General)			
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)			
	<b>Estimated Actual*</b>		<b>Estimated</b>
	<b>2013-14</b>		<b>2014-15</b>
	-----		-----
<b><u>FTE Positions:</u></b>			
Faculty	58 .		59 .
Advisors	8 .		16 .
Staff	.		.
Total FTE Positions:	66		75
<b><u>Balance Forward from Prior Periods</u></b>			
Balance Forward	\$ -		\$ -
Less: Prior-Year Encumbrances	-		-
Beginning Balance Available:	\$ -		\$ -
<b><u>Receipts / Revenues</u></b>			
	\$ 9,015,473		9,847,915
Tuition Differential Collections	-		-
Interest Revenue - Current Year	-		-
Interest Revenue - From Carryforward	-		-
Balance	-		-
Total Receipts / Revenues:	9,015,473		9,847,915 -
<b><u>Expenditures</u></b>			
Salaries & Benefits	6,310,831	-	6,893,540
Other Personal Services	-		-
Expenses	-		-
Operating Capital Outlay	-		-
	-		
Student Financial Assistance	2,704,642		2,954,375 -
Expended From Carryforward Balance	-		-
**Other Category Expenditures	-		-
Total Expenditures:	\$ 9,015,473		\$ 9,847,915
<b>Ending Balance Available:</b>	<b>\$ -</b>		<b>\$ -</b>
*Since the 2012-13 year has not been completed, provide an estimated actual.			
**Provide details for "Other Categories" used.			



PENDING BOT APPROVAL

## FISCAL INFORMATION (continued)

### UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
<b>Tuition:</b>							
Base Tuition - (0% inc. for 2014-15 to 2017-18)	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07	\$105.07
Tuition Differential	21.42	\$36.38	\$36.38	\$36.38	\$36.38	\$36.38	\$36.38
<b>Total Base Tuition &amp; Differential per Credit Hour</b>	<b>\$124.74</b>	<b>\$139.70</b>	<b>\$141.45</b>	<b>\$141.45</b>	<b>\$141.45</b>	<b>\$141.45</b>	<b>\$141.45</b>
% Change		12.0%	1.3%	0.0%	0.0%	0.0%	0.0%
<b>Fees (per credit hour):</b>							
Student Financial Aid <sup>1</sup>	\$5.15	\$5.15	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Capital Improvement <sup>2</sup>	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$11.24	\$11.24	\$11.50	\$11.50	\$11.73	\$11.96	\$12.20
Health	\$8.34	\$8.79	\$9.24	\$9.24	\$9.42	\$9.61	\$9.80
Athletic	\$16.54	\$16.79	\$17.54	\$17.54	\$17.89	\$18.25	\$18.62
Transportation Access	\$8.50	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70	\$8.70
Technology <sup>1</sup>	\$5.15	\$5.15	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
<b>Total Fees</b>	<b>\$59.68</b>	<b>\$62.58</b>	<b>\$64.24</b>	<b>\$64.24</b>	<b>\$65.00</b>	<b>\$65.78</b>	<b>\$66.58</b>
<b>Total Tuition and Fees per Credit Hour</b>	<b>\$184.42</b>	<b>\$202.28</b>	<b>\$205.69</b>	<b>\$205.69</b>	<b>\$206.45</b>	<b>\$207.23</b>	<b>\$208.03</b>
% Change		9.7%	1.7%	0.0%	0.4%	0.4%	0.4%
<b>Fees (block per term):</b>							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
List any new fee proposed							
<b>Total Block Fees per term</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
<b>Total Tuition for 30 Credit Hours</b>	<b>\$3,742.20</b>	<b>\$4,191.00</b>	<b>\$4,243.50</b>	<b>\$4,243.50</b>	<b>\$4,243.50</b>	<b>\$4,243.50</b>	<b>\$4,243.50</b>
<b>Total Fees for 30 Credit Hours</b>	<b>\$1,790.40</b>	<b>\$1,877.40</b>	<b>\$1,927.20</b>	<b>\$1,927.20</b>	<b>\$1,950.00</b>	<b>\$1,973.40</b>	<b>\$1,997.40</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$5,532.60</b>	<b>\$6,068.40</b>	<b>\$6,170.70</b>	<b>\$6,170.70</b>	<b>\$6,193.50</b>	<b>\$6,216.90</b>	<b>\$6,240.90</b>
\$ Change		\$535.80	\$102.30	\$0.00	\$22.80	\$23.40	\$24.00
% Change		9.7%	1.7%	0.0%	0.4%	0.4%	0.4%
<b>Out-of-State Fees</b>							
Out-of-State Undergraduate Fee	\$559.80	\$604.58	\$604.58	\$604.58	\$604.58	\$604.58	\$604.58
Out-of-State Undergraduate Student Financial Aid <sup>3</sup>	\$27.99	\$30.21	\$30.21	\$30.21	\$30.21	\$30.21	\$30.21
Total per credit hour	\$587.79	\$634.79	\$634.79	\$634.79	\$634.79	\$634.79	\$634.79
% Change		8.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Tuition for 30 Credit Hours</b>	<b>\$20,536.20</b>	<b>\$22,328.40</b>	<b>\$22,380.90</b>	<b>\$22,380.90</b>	<b>\$22,380.90</b>	<b>\$22,380.90</b>	<b>\$22,380.90</b>
<b>Total Fees for 30 Credit Hours</b>	<b>\$2,630.10</b>	<b>\$2,783.70</b>	<b>\$2,833.50</b>	<b>\$2,833.50</b>	<b>\$2,856.30</b>	<b>\$2,879.70</b>	<b>\$2,903.70</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$23,166.30</b>	<b>\$25,112.10</b>	<b>\$25,214.40</b>	<b>\$25,214.40</b>	<b>\$25,237.20</b>	<b>\$25,260.60</b>	<b>\$25,284.60</b>
\$ Change		\$1,945.80	\$102.30	\$0.00	\$22.80	\$23.40	\$24.00
% Change		8.4%	0.4%	0.0%	0.1%	0.1%	0.1%
<b>Housing/Dining<sup>4</sup></b>	<b>\$9,160.82</b>	<b>\$9,424.00</b>	<b>\$9,612.48</b>	<b>\$9,804.73</b>	<b>\$10,000.82</b>	<b>\$10,200.84</b>	<b>\$10,404.86</b>
\$ Change		\$263.18	\$188.48	\$192.25	\$196.09	\$200.02	\$204.02
% Change		2.9%	2.0%	2.0%	2.0%	2.0%	2.0%

<sup>1</sup> can be no more than 5% of tuition.<sup>3</sup> can be no more than 5% of tuition and the out-of-state fee.<sup>2</sup> as approved by the Board of Governors.<sup>4</sup> combine the most popular housing and dining plans provided to students



## ENROLLMENT PLANNING

Planned Enrollment Growth by Student Type *(for all E&G students at all campuses)*

	5 YEAR TREND (2007-12)	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	+64%Δ	8,369	66%	8914	66%	9,560	67%	10,120	67%
FTIC (Profile Admit)	-6%Δ	377	3%	402	3%	335	2%	370	2%
AA Transfers*	+39%Δ	2,450	19%	2,580	19%	2,735	19%	2,845	19%
Other Transfers	+12%Δ	1,579	12%	1,664	12%	1,745	12%	1,815	12%
Subtotal	+48%Δ	12,775	100%	13,560	100%	14,375	100%	15,150	100%
GRADUATE STUDENTS									
Master's	-10%Δ	863	87%	840	86%	845	85%	855	84%
Research Doctoral	n/a	48	5%	55	6%	60	6%	65	6%
Professional Doctoral	230%Δ	76	8%	85	9%	90	9%	95	9%
Subtotal	0%Δ	987	100%	980	100%	995	100%	1,015	100%
NOT-DEGREE SEEKING	-47%Δ	312		310		300		300	
MEDICAL	n/a	n/a		n/a		n/a		n/a	
TOTAL	+37%Δ	14,074		14,850		15,670		16,465	

Note\*: AA transfers refer only to transfers from the Florida College System.

Planned Enrollment Growth by Method of Instruction *(for all E&G students at all campuses)*

	2 YEAR TREND (2010-11 to 2012-13)	2012-13		2014-15		2015-16		2016-17	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
<b>UNDERGRADUATE</b>									
DISTANCE (>80%)	+4%Δ	1,188	15%	1,285	15%	1,480	16%	1,580	17%
HYBRID (50%-79%)	+9%Δ	154	2%	235	3%	330	4%	430	5%
TRADITIONAL (<50%)	+14%Δ	6,349	83%	7,026	82%	7,209	80%	7,478	78%
<b>TOTAL</b>	<b>+12%Δ</b>	<b>7,691</b>	<b>100%</b>	<b>8,546</b>	<b>100%</b>	<b>9,019</b>	<b>100%</b>	<b>9,488</b>	<b>100%</b>
<b>GRADUATE</b>									
DISTANCE (80%)	-9%Δ	191	29%	180	29%	185	30%	200	31%
HYBRID (50%-79%)	-36%Δ	53	8%	40	7%	50	8%	60	9%
TRADITIONAL (<50%)	-6%Δ	420	63%	395	64%	390	62%	387	60%
<b>TOTAL</b>	<b>-10%Δ</b>	<b>664</b>	<b>100%</b>	<b>615</b>	<b>100%</b>	<b>625</b>	<b>100%</b>	<b>647</b>	<b>100%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).



PENDING BOT APPROVAL

## ENROLLMENT PLANNING (continued)

## Planned Enrollment Plan by Residency and Student Level (Florida FTE)

	Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*
<b>STATE FUNDABLE</b>									
<i>Florida Resident</i>									
LOWER	4275	2224	4530	4757	4995	5245	5507	5782	5.2%
UPPER	3473	2319	3655	3838	4030	4232	4444	4666	5.0%
GRAD I	491	510	475	476	485	509	535	561	2.3%
GRAD II	111	10	111	115	120	126	132	139	3.8%
TOTAL	8350	5063	8771	9186	9630	10112	10618	11148	4.9%
<i>Non-Resident</i>									
LOWER	230	n/a	254	282	312	327	343	361	7.8%
UPPER	128	n/a	134	142	151	158	166	174	5.3%
GRAD I	18	n/a	15	14	12	12	13	13	-4.9%
GRAD II	9	n/a	14	20	30	31	33	34	26.9%
TOTAL	385	310	417	458	505	528	555	582	7.2%
<b>TOTAL</b>									
LOWER	4505	n/a	4784	5039	5307	5572	5850	6143	5.3%
UPPER	3601	n/a	3789	3980	4181	4390	4610	4840	5.1%
GRAD I	509	n/a	490	490	497	521	548	574	2.1%
GRAD II	120	n/a	125	135	150	157	165	173	6.3%
TOTAL	8735	5373	9188	9644	10135	10640	11173	11730	5.0%
<b>NOT STATE FUNDABLE</b>									
LOWER	61	n/a	65	68	72	76	80	84	5.5%
UPPER	47	n/a	49	51	54	57	60	63	5.0%
GRAD I	14	n/a	13	13	13	14	15	16	2.4%
GRAD II	3	n/a	3	3	3	3	3	3	0.0%
TOTAL	125	n/a	130	135	142	150	158	166	4.8%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note\*: The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.



PENDING BOT APPROVAL

## ACADEMIC PROGRAM COORDINATION

## New Programs For Consideration by University in AY 2014-15

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Music Therapy	51.2305		FSU	No	30	4/2015
Renewable Energy	14.9999	STEM	None	No	60	4/2015

**MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS**

Educational Technology	13.0501	STEM	FSU, UCF, UWF	Yes	30	4/2015
Engineering	14.0101	STEM	FPU, USF	No	30	4/2015

**DOCTORAL PROGRAMS**

## New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Real Estate	52.1501		FAU, FIU, FSU, UCF, UF	No	45	4/2016
Public Health	51.2201	HEALTH	USFT	Yes	50	4/2017
<b>MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS</b>						
Biology	26.0101	STEM	FAMU, FAU, FIU, FSU, UCF, UNF, USFT, UWF, UF	No	20	4/2016
Physician Assistant Studies	51.0912	HEALTH	UF, USFT	No	60	4/2016
Health Administration	51..0701	HEALTH	FAMU, FIU, FAU, UNF, USFT	Yes	60	4/2017
<b>DOCTORAL PROGRAMS</b>						
Occupational Therapy	51.2306	HEALTH	None	No	25	4/2017



## DEFINITIONS

### Performance Based Funding

**Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation**

This metric is based on the percentage of a graduating class of bachelor's degree recipients who are employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded.

Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation.

Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Median Wages of Bachelor's Graduates Employed Full-time in Florida One Year After Graduation**

This metric is based on annualized Unemployment Insurance (UI) wage data from the fourth fiscal quarter after graduation for bachelor's recipients. UI wage data does not include individuals who are self-employed, employed out of state, employed by the military or federal government, those without a valid social security number, or making less than minimum wage. Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Average Cost per Bachelor's Degree**  
*Instructional costs to the university*

For each of the last four years of data, the annual total undergraduate instructional expenditures were divided by the total fundable student credit hours to create a cost per credit hour for each year. This cost per credit hour was then multiplied by 30 credit hours to derive an average annual cost. The average annual cost for each of the four years was summed to provide an average cost per degree for a baccalaureate degree that requires 120 credit hours. Sources: State University Database System (SUDS), Expenditure Analysis: Report IV (2009-10 through 2012-13).

**Six Year FTIC Graduation Rate**

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Students of degree programs longer than four years (eg, PharmD) are included in the cohorts. Students who are active duty military are not included in the data. Source: State University Database System (SUDS).

**Academic Progress Rate**  
*2nd Year Retention with GPA Above 2.0*

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with had a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer). Source: State University Database System (SUDS).

**University Access Rate**  
*Percent of Undergraduates with a Pell-grant*

This metric is based the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric. Source: State University Database System (SUDS).

**Bachelor's Degrees Awarded within Programs of Strategic Emphasis**  
(includes STEM)

This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included). Source: State University Database System (SUDS).

**Graduate Degrees Awarded within Programs of Strategic Emphasis**  
(includes STEM)

This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included). Source: State University Database System (SUDS).



**Freshmen in Top 10% of High School Class**

Applies to: NCF

Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class.

Source: New College of Florida.

**BOG Choice Metrics****Percent of Bachelor's Degrees Without Excess Hours**

This metric is based on the percentage of baccalaureate degrees awarded within 110% of the credit hours required for a degree based on the Board of Governors Academic Program Inventory.

Note: It is important to note that the statutory provisions of the "Excess Hour Surcharge" (1009.286, FS) have been modified several times by the Florida Legislature, resulting in a phased-in approach that has created three different cohorts of students with different requirements. The performance funding metric data is based on the latest statutory requirements that mandates 110% of required hours as the threshold. In accordance with statute, this metric excludes the following types of student credits (ie, accelerated mechanisms, remedial coursework, non-native credit hours that are not used toward the degree, non-native credit hours from failed, incomplete, withdrawn, or repeated courses, credit hours from internship programs, credit hours up to 10 foreign language credit hours for transfer students in Florida, and credit hours earned in military science courses that are part of the Reserve Officers' Training Corps (ROTC) program).

Source: State University Database System (SUDS).

**Number of Faculty Awards**

This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards. Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).

**National Ranking for Institutional & Program Achievements**

This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

Source: Board of Governors staff review.

**BOT Choice Metrics****Percent of R&D Expenditures Funded from External Sources**  
FAMU

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.

Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

**Bachelor's Degrees Awarded to Minorities**  
FAU, FGCU, FIU

This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code.

Source: State University Database System (SUDS).

**National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News**  
FSU

This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count.

Source: US News and World Report's annual National University rankings.





<b>Percent of Undergraduate Seniors Participating in a Research Course</b> NCF	This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year. Source: New College of Florida.
<b>Number of Bachelor Degrees Awarded Annually</b> UCF	This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once. Source: State University Database System (SUDS).
<b>Total Research Expenditures</b> UF	This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
<b>Percent of Course Sections Offered via Distance and Blended Learning</b> UNF	This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both. Source: State University Database System (SUDS).
<b>Number of Postdoctoral Appointees</b> USF	This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar. Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Percentage of Adult Undergraduates Enrolled</b> UWF	This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified. Source: State University Database System (SUDS).

#### Preeminent Research University Funding Metrics

<b>Average GPA and SAT Score</b>	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Public University National Ranking</b>	A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.
<b>Freshman Retention Rate (Full-time, FTIC)</b>	Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.



PENDING BOT APPROVAL

<b>6-year Graduation Rate</b> (Full-time, FTIC)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1%-2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.
<b>National Academy Memberships</b>	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of \$200 million or more, as reported annually by the National Science Foundation (NSF).
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount.
<b>National Ranking in S.T.E.M. Research Expenditures</b>	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
<b>Patents Awarded</b> (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/20100101->20131231 AND APT/1)".
<b>Doctoral Degrees Awarded Annually</b>	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report. Note: per legislative workpapers, this metric does not include Professional degrees.
<b>Number of Post-Doctoral Appointees</b>	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Endowment Size (\$M)</b>	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.

**Goals Common to All Universities****Academic Quality**

**Avg. SAT Score** (for 3 subtests) The average SAT score for all three subtests (reading, mathematics and writing) for Admitted & Registered FTIC (B,E) students (Fall only).

**Avg. HS GPA** The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.

**Professional/Licensure Exam First-time Pass Rates** The number of exams with first-time pass rates above and below the national or state average, as reported in the 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.

**Operational Efficiency**

**Freshman Retention Rate** The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the same institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see [link](#).

**FTIC Graduation Rates**  
In 4 years (or less)  
In 6 years (or less) As reported in the 2012-13 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the same institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.

**AA Transfer Graduation Rates**  
In 2 years (or less)  
In 4 years (or less) As reported in the 2012-13 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the same institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.

**Average Time to Degree (for FTIC)** This metric is the number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.

**Return on Investment**

**Bachelor's Degrees Awarded** This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).

**Percent of Bachelor's Degrees in STEM** The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 4H).

**Graduate Degrees Awarded** This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).

**Percent of Graduate Degrees in STEM** The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).

**Annual Gifts Received (\$M)** As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at [www.cae.org/vse](http://www.cae.org/vse).) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.

**Endowment (\$M)** Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).



## Goals Specific to Research Universities

### Academic Quality

#### Faculty Awards

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

#### National Academy Members

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

#### Number of Post-Doctoral appointees

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).

#### Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures

The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at [link](#)), but now data must be queried via WebCASPAR – see [link](#).

### Return on Investment

#### Total Research Expenditures (\$M)

Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Science & Engineering Research Expenditures in non-medical/health sciences

This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see [link](#), table 36 *minus* table 52), but now data must be queried via WebCASPAR.

#### Percent of R&D Expenditures funded from External Sources

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.  
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Patents Issued

The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).

#### Licenses/Options Executed

Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).

#### Licensing Income Received (\$M)

License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2012-13 Accountability Report (table 6A).

#### Number of Start-up Companies

The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2012-13 Accountability Report (table 6A).

#### National rank is higher than predicted by Financial Resources Ranking

*based on US News & World Report*

This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.



<b>Research Doctoral Degrees Awarded</b>	The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).
<b>Professional Doctoral Degrees Awarded</b>	The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

### Student Debt Summary

#### Percent of Bachelor's Recipients with Debt

This is the percentage of bachelor's graduates in a given academic year who entered the university as a first-time-in-college (FTIC) student and who borrowed through any loan programs (institutional, state, Federal Perkins, Federal Stafford Subsidized and unsubsidized, private) that were certified by your institution - excludes parent loans.  
Source: Common Dataset (H4).

#### Average Amount of Debt for Bachelor's who have graduated with debt

This is the average amount of cumulative principal borrowed (from any loan program certified by the institution) for each native, FTIC bachelor's recipient in a given academic year that graduated with debt – see metric definition above. This average does NOT include students who did not enter a loan program that was certified by the institution.  
Source: Common Dataset (H5).

#### Student Loan Cohort Default Rate (3rd Year)

Student loan cohort default rate (CDR) data includes undergraduate and graduate students, and refers to the three federal fiscal year period when the borrower enters repayment and ends on the second fiscal year following the fiscal year in which the borrower entered repayment. Cohort default rates are based on the number of borrowers who enter repayment, not the number and type of loans that enter repayment. A borrower with multiple loans from the same school whose loans enter repayment during the same cohort fiscal year will be included in the formula only once for that cohort fiscal year. Default rate debt includes: Federal Stafford Loans, and Direct Stafford/Ford Loans – for more information see:  
<http://ifap.ed.gov/DefaultManagement/CDRGuideMaster.html>.

Three Year CDR			
Cohort Fiscal Year	Year Published	Borrowers in the Numerator Borrowers in the Denominator	3-Yr Time Period (Numerator) 1-Yr Time Period (Denominator)
2009	2012	Borrowers who entered repayment in 2009 and defaulted in 2009, 2010 or 2011 Borrowers who entered repayment in 2009	10/01/2008 to 9/30/2011 10/01/2008 to 9/30/2009
2010	2013	Borrowers who entered repayment in 2010 and defaulted in 2010, 2011 or 2012 Borrowers who entered repayment in 2010	10/01/2009 to 9/30/2012 10/01/2009 to 9/30/2010
2011	2014*	Borrowers who entered repayment in 2011 and defaulted in 2011, 2012 or 2013 Borrowers who entered repayment in 2011	10/01/2010 to 9/30/2013 10/01/2010 to 9/30/2011
2012	2015	Borrowers who entered repayment in 2012 and defaulted in 2012, 2013 or 2014 Borrowers who entered repayment in 2012	10/01/2011 to 9/30/2014 10/01/2011 to 9/30/2012
2013	2016	Borrowers who entered repayment in 2013 and defaulted in 2013, 2014 or 2015 Borrowers who entered repayment in 2013	10/01/2012 to 9/30/2015 10/01/2012 to 9/30/2013
2014	2017	Borrowers who entered repayment in 2014 and defaulted in 2014, 2015 or 2016 Borrowers who entered repayment in 2014	10/01/2013 to 9/30/2016 10/01/2013 to 9/30/2014
2015	2018	Borrowers who entered repayment in 2015 and defaulted in 2015, 2016 or 2017 Borrowers who entered repayment in 2015	10/01/2014 to 9/30/2017 10/01/2014 to 9/30/2015



# FSU

## 2014-15 Work Plan



**Florida State University**

*Work Plan Presentation for 2014-15 Board of Governors Review*

STATE UNIVERSITY SYSTEM of FLORIDA | **Board of Governors**

### **INTRODUCTION**



*The State University System of Florida has developed three tools that aid in guiding the System's future.*

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

*These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.*

*The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.*

*Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.*





## TABLE OF CONTENTS

### **1. STRATEGY**

- a. Mission Statement
- b. Vision Statement
- c. Statement of Strategy
- d. Strengths and Opportunities
- e. Key Initiatives & Investments

### **2. PERFORMANCE BASED FUNDING METRICS**

### **3. PREEMINENT RESEARCH UNIVERSITY METRICS**

### **4. OTHER KEY PERFORMANCE INDICATORS**

- a. Goals Common to All Universities
- b. Goals Specific to Research Universities
- c. Institution Specific Goals

### **5. OPERATIONS**

- a. Fiscal Information (*includes Tuition Differential Fee Request*)
- b. Enrollment Planning
- c. Academic Program Coordination

### **6. DEFINITIONS**



## MISSION STATEMENT (What is your purpose?)

Florida State University preserves, expands, and disseminates knowledge in the sciences, technology, arts, humanities, and professions, while embracing a philosophy of learning strongly rooted in the traditions of the liberal arts. The university is dedicated to excellence in teaching, research, creative endeavors, and service. The university strives to instill the strength, skill, and character essential for lifelong learning, personal responsibility, and sustained achievement within a community that fosters free inquiry and embraces diversity.

## VISION STATEMENT (What do you aspire to?)

The vision for Florida State University as adopted in its recent strategic plan states that “Florida State University will be one of the world’s premier institutions of higher education, devoted to transforming the lives of our students, shaping the future of our state and society, and offering programs of national and international distinction in a climate of inquiry, engagement, collegiality, diversity, and achievement.”

## STATEMENT OF STRATEGY (How will you get there?)

*Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.*

Florida State University competes in national and international markets for faculty, and our student centered education is provided by an outstanding faculty defining the frontiers of research and creativity. As a top-tier research university, it is crucial to offer the full breadth of disciplinary excellence, and we seek continual improvement in our position in retaining and educating the most promising students in the State of Florida. Recruitment and retention of faculty is essential to maintain market competitiveness, and our strategy is to leverage our long-standing and well-developed strengths in the physical sciences and fine arts with emerging opportunities for innovation and problem-solving in the sciences and the professions.



## STRENGTHS AND OPPORTUNITIES *(within 3 years)*

*What are your core capabilities, opportunities and challenges for improvement?*

A core capability of Florida State University is its extraordinarily efficient and effective use of the resources entrusted to it. We intend to advance the important mission of FSU by deliberately leveraging our strengths and successes and by expanding opportunities through new partnerships. Our most immediate need is to hire additional faculty, and we will use recurring and nonrecurring funds to invest in new faculty, replacing the non-recurring funds with recurring revenue when it becomes available.

## KEY INITIATIVES & INVESTMENTS *(within 3 years)*

*Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.*

1. Become a National Top 25 Public University: The national ranking of FSU is highly dependent on investment in STEM fields. We are engaged in strategic hiring initiatives in energy and materials, coastal and marine ecosystems, and brain health and disease. All three of these initiatives address critical needs of the state and nation, are tied to research funding initiatives, and leverage strengths of FSU. In addition, we are recruiting for a director and several faculty positions for our newly established Institute for Successful Longevity with the goal of advancing interdisciplinary research and teaching in the promotion of health and quality of life across the life span. These targeted investments are expected to result in increases in national rankings of our STEM programs. Relatedly, we will invest in resources to support graduate students in STEM fields and to increase undergraduate research opportunities in the STEM fields. Finally, FSU is embarking on revisions to our curriculum in order to meet the rapid technological changes that impact critical thinking, problem solving, communication, collaboration, creativity and innovation skills that are integral to the success of all of our students.

2 Entrepreneurial University Program: This program is part of FSU's plan to become a State and National leader in student career readiness. Across the U.S., most business courses are usually available only to business majors, yet entrepreneurs span a wide variety of majors, and to limit such valuable education to only those majoring in business is to lose out on opportunities to strengthen the value of degrees in other fields. As one example, consider the increased value of a degree in engineering if it is combined with the fundamental courses in business and entrepreneurship. FSU has hired the faculty necessary to open a four-course sequence in entrepreneurship to all majors. In addition, we are hiring Entrepreneurs-in-Residence in our colleges to enable faculty and students to take ideas to the marketplace, fund an enhanced start-up competition, create start-up incubators, create partnerships between business majors and STEM graduate students, and create a platform for investors to partner with the University. This program is designed to promote the job prospects and entrepreneurial potential of students and faculty, and to create new partnerships with industry. Finally, we've added career readiness milestones to Academic Maps to prompt students to engage in post-graduation planning and we are embedding career center liaisons in our academic departments to serve as resources for students, advisors and faculty.

3 Improving Student - Faculty Ratios: The loss of faculty has resulted in decreased course availability and larger classes – with the likely result of increasing time to graduation. Longer graduation times are a significant waste of taxpayer dollars. Having fewer faculty members also diminishes the ability of the university to accomplish its research mission and expand our contract and grant funding, all of which also reduce opportunities for our students who benefit by working directly with faculty in their research labs. Moreover, improving student-faculty ratios is important for achieving our goal of becoming a Top 25 Public University. We propose a deliberate effort to target faculty hiring to student needs at all levels



## PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Metrics Common To All Universities</b>						
<b>Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation</b>	-2% pts	61%	62%	63%	64%	65%
<b>Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation</b>	1%	\$30,300	\$30,900	\$31,500	\$32,100	\$32,800
<b>Average Cost per Bachelor's Degree</b> [Instructional Costs to the University]	2%	\$25,255	\$26,910	\$28,669	\$31,704	\$33,571
<b>FTIC 6 year Graduation Rate</b> [Includes full- and part-time students]	2% pts	75%	77%	79%	79%	80%
<b>Academic Progress Rate</b> [FTIC 2 year Retention Rate with GPA>2 ]	0% pts	90%	90%	91%	91%	92%
<b>University Access Rate</b> [Percent of Fall Undergraduates with a Pell grant]	-1% pt	35%	36%	35%	35%	35%
<b>Bachelor's Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	2% pts	38%	38%	39%	40%	41%
<b>Graduate Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	0% pt	38%	39%	40%	41%	42%
<b>Board of Governors Choice Metric</b>						
<b>Percent of Bachelor's Degrees Without Excess Hours</b>	-1% pt	77%	78%	79%	80%	81%
<b>Number of Faculty Awards</b> [for FSU and UF only] [* 2012 TARU Report]	22%	11*	11	12	12	13
<b>Board of Trustees Choice Metric</b>						
<b>National Rank is Higher than Predicted by the Financial Resources Ranking</b> [based on U.S. News & World Report]	n/a	91 overall 211 financial	89 overall 210 financial	88 overall 208 financial	86 overall 207 financial	85 overall 205 financial

Note: Metrics are defined in appendix.



## PREEMINENT RESEARCH UNIVERSITY FUNDING METRICS

The Board of Governors shall designate each state research university that meets at least 11 of the 12 following academic and research excellence standards as a preeminent state research university. For this year, the University of Florida and Florida State University are the only universities required to complete the table below. The Board of Governors will consider the shaded 2014 actual data for approval.

	BENCH- MARKS	2014 ACTUAL	2015 GOALS	2016 GOALS	2017 GOALS	2018 GOALS
<b>Average GPA and SAT Score</b> for incoming freshman in Fall semester	<b>4.0 GPA</b> <b>1800 SAT</b>	4.0 1830	4.0 1830	4.0 1835	4.1 1840	4.1 1840
<b>Public University National Ranking</b> (in more than one national ranking)	<b>Top 50</b>	3	4	4	4	5
<b>Freshman Retention Rate</b> (Full-time, FTIC)	<b>90%</b>	91%	92%	92%	93%	93%
<b>6-year Graduation Rate</b> (Full-time, FTIC)	<b>70%</b>	77%	79%	79%	80%	80%
<b>National Academy Memberships</b>	<b>6</b>	7	7	7	8	8
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	<b>\$200 M</b>	\$224 M	\$228.9 M	\$233.5 M	\$238.1 M	\$242.9 M
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	<b>\$150 M</b>	\$ 217 M	\$221.0 M	\$225.5 M	\$230.0 M	\$234.6 M
<b>National Ranking in S.T.E.M. Research Expenditures</b> (includes public & private institutions)	<b>Top 100</b> in 5 of 8 disciplines	7	7	7	7	7
<b>Patents Awarded</b> (over 3 year period)	<b>100</b>	103	119	128	123	126
<b>Doctoral Degrees Awarded Annually</b> (Does not include Professional degrees)	<b>400</b>	370	410	420	420	420
<b>Number of Post-Doctoral Appointees</b>	<b>200</b>	241	217	217	212	210
<b>Endowment Size (\$M)</b>	<b>\$500 M</b>	\$548 M	\$585 M	\$625 M	\$660 M	\$690 M
<b>NUMBER OF METRICS ABOVE THE BENCHMARK</b>	<b>11 of 12</b>	<b>11</b>	<b>12</b>	<b>12</b>	<b>12</b>	<b>12</b>

Note: Due to the various timelines that these data represent, the data reported in each column corresponds to the most updated data for the June Board meeting each year. Metrics are defined in appendix.



## KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'<sup>1</sup>, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

---

<sup>1</sup> The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).



## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Common to All Universities

#### Academic Quality

##### National Ranking for University and Programs

Florida State University proposes to become a National Top 25 Public University and to become a State and National Leader in Student Career Readiness. With a truly comprehensive spectrum of high quality programs, FSU is knocking on the door of the top public universities in the nation, and we are achieving excellence more efficiently than any other research university. The ranking of FSU is highly dependent on investment in STEM fields. With targeted investment, we expect to maintain at least one STEM field in the top 5, achieve two STEM fields in the top 10, one in the top 15, two in top the 20, and move Engineering into the top 50. With these advances in recognition of our STEM programs, FSU would be among the truly first-rate public universities in STEM and move into the top 25 ranking of all public universities. Further, FSU is embarking on revisions to our curriculum that will impact critical thinking, problem-solving, communication, collaboration, creativity and innovation skills that are integral to success in all fields.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>SAT Score</b> [for 3 subtests] [* 2009-10-2012-13]	1%*	1838	1830	1830	1835	1840
<b>High School GPA</b>	0.2 pt	4.0	4.0	4.0	4.0	4.0
<b>Professional/Licensure Exam First-time Pass Rates<sup>1</sup></b>						
Exams Above Benchmarks	n/a	4	5	5	5	5
Exams Below Benchmarks	n/a	1	0	0	0	0
<b>Operational Efficiency</b>						
<b>Freshman Retention Rate</b>	0%	91%	92%	92%	93%	93%
<b>FTIC Graduation Rates</b>						
In 4 years (or less)	12% pts	61%	61%	61%	62%	62%
In 6 years (or less)	6% pts	77%	79%	79%	80%	80%
<b>AA Transfer Graduation Rates</b>						
In 2 years (or less)	-7% pts	39%	41%	42%	42%	43%
In 4 years (or less)	4% pts	79%	81%	82%	82%	83%
<b>Average Time to Degree</b> (for FTIC)	0 yrs	4.2 yrs	4.2 yrs	4.1 yrs	4.1 yrs	4.1 yrs
<b>Return on Investment</b>						
<b>Bachelor's Degrees Awarded</b>	4%	7,938	8,083	8,100	8,150	8,200
<b>Percent of Bachelor's Degrees in STEM</b>	3%	16%	16%	17%	18%	20%
<b>Graduate Degrees Awarded</b>	9%	3,104	2,917	2,900	2,900	3,000
<b>Percent of Graduate Degrees in STEM</b>	3%	15%	16%	16%	17%	18%
<b>Annual Gifts Received (\$M)</b>	30%	\$ 61 M	\$ 55 M	\$ 65 M	\$ 70 M	\$ 75 M
<b>Endowment (\$M)</b>	34%	\$ 548.1 M	\$ 585 M	\$ 625 M	\$ 660 M	\$ 690 M

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.





## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Specific to Research Universities

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Academic Quality</b>						
<b>Faculty Awards</b> ] [* 2012 TARU Report]	0%	11*	11	12	12	13
<b>National Academy Members</b> ] [* 2012 TARU Report]	0%	7*	7	7	8	8
<b>Number of Post-Doctoral Appointees*</b> [# 2012 TARU Report]	-4%	241 #	217	217	212	210
<b>Number of Science &amp; Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures*</b>	n/a	7 of 8	7 of 8	7 of 8	7 of 8	7 of 8
<b>Return on Investment</b>						
<b>Total Research Expenditures (\$M)</b> [includes non-Science & Engineering disciplines]	6%	\$ 250.9 M	\$ 255.9 M	\$ 261.0 M	\$ 266.3 M	\$ 271.6 M
<b>Science &amp; Engineering Research Expenditures (\$M)</b>	15%	\$224.4 M	\$ 228.9 M	\$ 233.5 M	\$ 238.1 M	\$ 242.9 M
<b>Science &amp; Engineering R&amp;D Expenditures in Non-Medical/Health Sciences (\$M)</b>	19%	\$ 216.7 M	\$ 221.0 M	\$ 225.5 M	\$ 230.0 M	\$ 234.6 M
<b>Percent of Research Expenditures funded from External Sources</b>	-8% pts	64%	64%	63%	63%	63%
<b>Patents Issued</b>	330%	43	40	41	42	43
<b>Licenses/Options Executed</b>	50%	15	15	15	15	15
<b>Licensing Income Received (\$M)</b>	-13%	\$ 1.03 M	\$ 1.03 M	\$ 1.03 M	\$1.03 M	\$ 1.03 M
<b>Number of Start-up Companies</b>	50%	3	4	4	4	5
<b>National Rank is Higher than Predicted by the Financial Resources Ranking</b> [based on U.S. News & World Report]	n/a	91 overall 211 financial	89 overall 210 financial	88 overall 208 financial	86 overall 207 financial	85 overall 205 financial
<b>Research Doctoral Degrees Awarded</b>	12%	370	410	420	420	420
<b>Professional Doctoral Degrees Awarded</b>	9%	366	409	425	430	435
<b>TOTAL NUMBER OF IMPROVING METRICS</b>			<b>8</b>	<b>7</b>	<b>8</b>	<b>7</b>

Note: An asterisk (\*) indicates that 2011-12 is the latest data available for these metrics.



## KEY PERFORMANCE INDICATORS

### Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

	<b>TREND (2008-09 to 2012-13)</b>	<b>2012-13 ACTUAL</b>	<b>2013-14 ESTIMATES</b>	<b>2014-15 GOALS</b>	<b>2015-16 GOALS</b>	<b>2016-17 GOALS</b>
Freshman in Top 10% of Graduating High School Class	10% pts	41%	42%	43%	44%	44%
Bachelor's Degrees in Areas of Strategic Emphasis	11%	3,449	3,538	3,600	3,700	3,825
Graduate Degrees in Areas of Strategic Emphasis	13%	1,170	1,126	1,250	1,275	1,325

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

**Goal 1.** Recruitment, development, and retention of outstanding, diverse faculty members are critical to being a pre-eminent university and to achieving our goal of becoming a Top 25 Public University. World-class programs delivered by a dedicated and creative faculty inspire students to reach new levels of achievement. This requires hiring new faculty in areas of strategic emphasis (e.g., STEM fields) and replenishing losses in the faculty ranks. We are challenged to enhance the opportunities we provide on campus to our most promising students, and hiring faculty with national and international preeminence as scholars and scientists is essential to our vision of being one of the world's premier institutions of higher education.

Number of Tenure/Tenure-earning faculty (taken from IPEDS HR Surveys; F/T Instructional Faculty)	-4%	1,021	1,026	1,060	1,100	1,150
---	-----	-------	-------	-------	-------	-------

**Goal 2.** Enrich the student experience by supporting and improving undergraduate, graduate, and professional education, with its accompanying positive effect on future graduates and the communities and professions they will serve. Our goal is student success, measured by high retention and graduation rates, access to cutting-edge knowledge, worthwhile employments and contributions to the vitality of our nation. We intend to be a leader in promoting the career readiness of our students by opening the doors to the College of Business to students of all majors, increasing opportunities for students to be involved in faculty research, and increasing opportunities for internships and experiential learning experiences.

Percent of Business Student Credit Hours Taken by Non-Business Majors <sup>1</sup> <sup>1</sup> Undergraduate Non-Business majors enrolled in upper division business courses	5% pts	17.8%	18.2%	19%	20%	20%
--	--------	-------	-------	-----	-----	-----



## FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2013-14 Actual	2014-15 Appropriations
<b>Education &amp; General – Main Operations</b>		
State Funds	\$ 296.0 (est.)	\$ 326.0 (est.)
Tuition	\$ 190.6 (est.)	\$ 192.3 (est.)
<b>TOTAL MAIN OPERATIONS</b>	<b>\$ 486.6 (est.)</b>	<b>\$ 518.3 (est.)</b>
<b>Education &amp; General – Health-Science Center / Medical Schools</b>		
State Funds	\$ 34.6 (est.)	\$ 35.0 (est.)
Tuition	\$ 9.9 (est.)	\$ 9.9 (est.)
<b>TOTAL HSC</b>	<b>\$ 44.5 (est.)</b>	<b>\$ 44.9 (est.)</b>
<b>Education &amp; General – Institute of Food &amp; Agricultural Sciences (IFAS)</b>		
State Funds	n/a	n/a
Tuition	n/a	n/a
<b>TOTAL IFAS</b>	<b>n/a</b>	<b>n/a</b>
<b>EDUCATION &amp; GENERAL TOTAL REVENUES</b>	<b>\$ 531.1 (est.)</b>	<b>\$ 563.2 (est.)</b>
Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). The 2014-15 appropriations data includes the funds associated with the Performance Based Funding model, which is contingent upon approval by the Board of Governors at their June Board meeting. Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.		
<b>OTHER BUDGET ENTITIES</b>		
<b>Auxiliary Enterprises</b>		
Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.		
Revenues	\$ 229.1 (est.)	\$ 228.0 (est.)
<b>Contracts &amp; Grants</b>		
Resources received from federal, state or private sources for the purposes of conducting research and public service activities.		
Revenues	\$ 253.3 (est.)	\$ 260.0 (est.)
<b>Local Funds</b>		
Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.		
Revenues	\$ 214.1 (est.)	\$ 218.1 (est.)
<b>Faculty Practice Plans</b>		
Revenues/receipts are funds generated from faculty practice plan activities.		
Revenues	\$ 8.8 (est.)	\$ 9.3
<b>OTHER BUDGET ENTITY TOTAL REVENUES</b>	<b>\$ 705.3 (est.)</b>	<b>\$ 715.4 (est.)</b>
<b>UNIVERSITY REVENUES GRAND TOTAL</b>	<b>\$ 1,236.4 (est.)</b>	<b>\$ 1,278.6 (est.)</b>



## FISCAL INFORMATION (continued)

## Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition	\$3,099.60	\$3,152.10	\$3,152.10	\$3,152.10	\$3,152.10
Tuition Differential Fee	\$1,487.70	\$1,487.70	\$1,487.70	\$1,576.80	\$1,671.30
Percent Increase	13%	1.1%	0%	1.9%	2%
Required Fees <sup>1</sup>	\$1,815.40	\$1,866.70	\$1,866.70	\$1,931.50	\$1,999.60
<b>TOTAL TUITION AND FEES</b>	<b>\$6,402.70</b>	<b>\$6,506.50</b>	<b>\$6,506.50</b>	<b>\$6,660.40</b>	<b>\$6,823.00</b>

Note<sup>1</sup>: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

## Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	48%	54%	51%	53%	52%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$20,993	\$22,139	\$23,365	\$22,772	\$22,500
NSLDS Cohort Year	2008	2009	2010	2011	2012 GOAL
Student Loan Cohort Default Rate (3rd Year)	7%	5%	7%	6%	5%

## Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$6,404	\$1,000	\$9,912	\$1,210	\$2,914	\$21,440
AT HOME	\$6,404	\$1,000	\$4,956	\$1,210	\$2,914	\$16,484

## Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	6,785	26%	\$13,747	\$(2,150)	\$7,761	\$4,089
\$40,000-\$59,999	2,572	10%	\$15,538	\$( 402)	\$5,970	\$3,898
\$60,000-\$79,999	2,384	9%	\$17,581	\$1,663	\$3,927	\$3,932
\$80,000-\$99,999	2,264	9%	\$18,226	\$2,338	\$3,282	\$3,851
\$100,000 Above	9,982	38%	\$18,417	\$2,606	\$3,091	\$2,257
Missing*	2,523	10%	n/a	\$3,053	\$3,333	\$ 188
TOTAL	26,510	100%	AVERAGE	\$16,828*	\$ 811	\$2,974

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note\*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

Effective Date	
University Board of Trustees approval date:	N/A – no increase for Fall 2014
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	N/A – no increase for Fall 2014
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	All university undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$49.59
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0
\$ Increase in tuition differential per credit hour:	\$0
\$ Increase in tuition differential for 30 credit hours:	\$0
Projected Differential Revenue Generated	
Incremental revenue generated in 2014-15 (projected):	\$0
Total differential fee revenue generated in 2014-15 (projected):	\$31,359,674
Intended Uses	
Funds related to the Summer increment of last year's increase will continue to be used to hire faculty to enhance the undergraduate experience	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
Request to Modify or Waive Tuition Differential Uses (pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)	



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2013-14 academic year.

2013-2014 - 70% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Hire additional faculty to support three key initiatives	
1) Entrepreneurial University Program	Since the tuition differential fee has not increased since 2012-13, there was no new revenue to allocate. The initial investment in new faculty continues for three initiatives.
2) STEM Excellence	
3) Critical needs for students success, includes pressure enrollment targets.	
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	209
Total Number of Advisors Hired or Retained (funded by tuition differential):	33
Total Number of Course Sections Added or Saved (funded by tuition differential):	2,795 in 2012-13 1,236 in 2011-12
2013-2014 - 30% Initiatives (list the initiatives provided in the 2013-14 tuition differential request)	University Update on Each Initiative
.	The university had 6,883 Pell eligible resident students who met the 2013-2014 Pell Promise requirements by the March 22, 2013 application deadline. All of these students were awarded financial aid (grants and/or scholarships) to cover tuition and fees.
Additional Information (estimates as of April 30, 2014):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	3,587
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,814
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$ 107
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$6,145



**FISCAL INFORMATION (continued)**  
**TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,**  
**& AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15**

**University Tuition Differential**

Budget Entity: 48900100 (Educational &amp; General)

SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)

	<b>Estimated Actual*</b> <b>2013-14</b> -----	<b>Estimated</b> <b>2014-15</b> -----
<b><u>FTE Positions:</u></b>		
Faculty	209.	212.
Advisors	33.	35.
Staff	11.	11.
Total FTE Positions:	253	258
<b><u>Balance Forward from Prior Periods</u></b>		
Balance Forward	\$ 5,189,962	\$ 3,528,412
Less: Prior-Year Encumbrances	0	0
Beginning Balance Available:	\$ 5,189,962	\$ 3,528,412
<b><u>Receipts / Revenues</u></b>		
Tuition Differential Collections	\$ 31,359,674	31,359,674
Interest Revenue - Current Year	0	0
Interest Revenue - From Carryforward Balance	0	0
Total Receipts / Revenues:	\$ 31,359,674	\$ 31,359,674
<b><u>Expenditures</u></b>		
Salaries & Benefits	\$ 22,600,000	\$ 23,384,140
Other Personal Services	530,000	550,000
Expenses	100,000	100,000
Operating Capital Outlay	0	0
Student Financial Assistance	4,941,224	7,243,722
Expended From Carryforward Balance	4,850,000	3,528,412
**Other Category Expenditures	0	0
Total Expenditures:	\$ 33,021,224	\$ 34,806,274
<b>Ending Balance Available:</b>	<b>\$ 3,528,412</b>	<b>\$ 81,812</b>

\*Since the 2013-14 year has not been completed, provide an estimated actual.

\*\*Provide details for "Other Categories" used.





## FISCAL INFORMATION (continued)

### UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<b>University: Florida State</b>							
<b><u>Undergraduate Students</u></b>	<b>-----Actual-----</b>			<b>-----Projected-----</b>			
	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>
<b>Tuition:</b>							
Base Tuition - (0% inc. for 2014-15 to 2017-18)	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07	\$105.07
Tuition Differential	\$32.00	\$49.59	\$49.59	\$49.59	\$52.56	\$55.71	\$59.05
<b>Total Base Tuition &amp; Differential per Credit Hour</b>	<b>\$135.32</b>	<b>\$152.91</b>	<b>\$154.66</b>	<b>\$154.66</b>	<b>\$157.63</b>	<b>\$160.78</b>	<b>\$164.12</b>
% Change		13.0%	1.1%	0.0%	1.9%	2.0%	2.1%
<b>Fees (per credit hour):</b>							
Student Financial Aid <sup>1</sup>	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Capital Improvement <sup>2</sup>	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76
Activity & Service	\$11.69	\$12.24	\$12.86	\$12.86	\$13.50	\$14.17	\$14.87
Health	\$12.96	\$13.42	\$13.97	\$13.97	\$14.66	\$15.39	\$16.15
Athletic	\$7.39	\$7.54	\$7.90	\$7.90	\$8.29	\$8.70	\$9.13
Transportation Access	\$8.40	\$8.90	\$8.90	\$8.90	\$9.34	\$9.80	\$10.29
Technology <sup>1</sup>	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00
<b>Total Fees</b>	<b>\$57.52</b>	<b>\$59.18</b>	<b>\$60.89</b>	<b>\$60.89</b>	<b>\$63.05</b>	<b>\$65.32</b>	<b>\$67.70</b>
<b>Total Tuition and Fees per Credit Hour</b>	<b>\$192.84</b>	<b>\$212.09</b>	<b>\$215.55</b>	<b>\$215.55</b>	<b>\$220.68</b>	<b>\$226.10</b>	<b>\$231.82</b>
% Change		10.0%	1.6%	0.0%	2.4%	2.5%	2.5%
<b>Fees (block per term):</b>							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
List any new fee proposed							
<b>Total Block Fees per term</b>	<b>\$20.00</b>	<b>\$20.00</b>	<b>\$20.00</b>	<b>\$20.00</b>	<b>\$20.00</b>	<b>\$20.00</b>	<b>\$20.00</b>
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Tuition for 30 Credit Hours</b>	<b>\$4,059.60</b>	<b>\$4,587.30</b>	<b>\$4,639.80</b>	<b>\$4,639.80</b>	<b>\$4,728.90</b>	<b>\$4,823.40</b>	<b>\$4,923.60</b>
<b>Total Fees for 30 Credit Hours</b>	<b>\$1,765.60</b>	<b>\$1,815.40</b>	<b>\$1,866.70</b>	<b>\$1,866.70</b>	<b>\$1,931.50</b>	<b>\$1,999.60</b>	<b>\$2,071.00</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$5,825.20</b>	<b>\$6,402.70</b>	<b>\$6,506.50</b>	<b>\$6,506.50</b>	<b>\$6,660.40</b>	<b>\$6,823.00</b>	<b>\$6,994.60</b>
\$ Change		\$577.50	\$103.80	\$0.00	\$153.90	\$162.60	\$171.60
% Change		9.9%	1.6%	0.0%	2.4%	2.4%	2.5%
<b>Out-of-State Fees</b>							
Out-of-State Undergraduate Fee	\$481.48	\$481.48	\$481.48	\$481.48	\$481.48	\$481.48	\$481.48
Out-of-State Undergraduate Student Financial Aid <sup>3</sup>	\$24.07	\$24.07	\$24.07	\$24.07	\$24.07	\$24.07	\$24.07
Total per credit hour	\$505.55	\$505.55	\$505.55	\$505.55	\$505.55	\$505.55	\$505.55
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Tuition for 30 Credit Hours</b>	<b>\$18,504.00</b>	<b>\$19,031.70</b>	<b>\$19,084.20</b>	<b>\$19,084.20</b>	<b>\$19,173.30</b>	<b>\$19,267.80</b>	<b>\$19,368.00</b>
<b>Total Fees for 30 Credit Hours</b>	<b>\$2,487.70</b>	<b>\$2,537.50</b>	<b>\$2,588.80</b>	<b>\$2,588.80</b>	<b>\$2,653.60</b>	<b>\$2,721.70</b>	<b>\$2,793.10</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$20,991.70</b>	<b>\$21,569.20</b>	<b>\$21,673.00</b>	<b>\$21,673.00</b>	<b>\$21,826.90</b>	<b>\$21,989.50</b>	<b>\$22,161.10</b>
\$ Change		\$577.50	\$103.80	\$0.00	\$153.90	\$162.60	\$171.60
% Change		2.8%	0.5%	0.0%	0.7%	0.7%	0.8%
<b>Housing/Dining<sup>4</sup></b>	<b>\$9,150.00</b>	<b>\$9,858.00</b>	<b>\$10,148.00</b>	<b>\$10,493.00</b>	<b>\$10,774.00</b>	<b>\$11,062.00</b>	<b>\$11,992.00</b>
\$ Change		\$708.00	\$290.00	\$345.00	\$281.00	\$288.00	\$930.00
% Change		7.7%	2.9%	3.4%	2.7%	2.7%	8.4%

<sup>1</sup> can be no more than 5% of tuition.<sup>3</sup> can be no more than 5% of tuition and the out-of-state fee.<sup>2</sup> as approved by the Board of Governors.<sup>4</sup> combine the most popular housing and dining plans provided to students



## ENROLLMENT PLANNING

### Planned Enrollment Growth by Student Type *(for all E&G students at all campuses)*

	5 YEAR TREND (2008-13)	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	3%	23,155	72%	23,200	72%	23,250	72%	23,300	72%
FTIC (Profile Admit)	-57%	70	0%	70	0%	69	0%	67	0%
AA Transfers*	25%	7,104	22%	7,100	22%	7,140	22%	7,180	22%
Other Transfers	36%	1,947	6%	1,950	6%	1,960	6%	1,970	6%
Subtotal	9%	32,276	100%	32,320	100%	32,419	100%	32,517	100%
GRADUATE STUDENTS									
Master's	-10%	4,159	55%	4,160	55%	4,220	55%	4,300	55%
Research Doctoral	1%	2,624	35%	2,625	35%	2,675	35%	2,750	35%
Professional Doctoral+	1%	771	10%	775	10%	785	10%	800	10%
Subtotal	-5%	7,554	100%	7,560	100%	7,680	100%	7,850	100%
NOT-DEGREE SEEKING	4%	1,166		1,180		1,190		1,200	
MEDICAL	17%	481		481		484		483	
TOTAL	6%	41,477		41,541		41,773		42,050	

Note\*: AA transfers refer only to transfers from the Florida College System. + Includes Law and Nursing; does not include Medical.

### Planned Enrollment Growth by Method of Instruction *(for all E&G students at all campuses)*

	2 YEAR TREND (2010-11 to 2012-13)	2012-13		2014-15		2015-16		2016-17	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
<b>UNDERGRADUATE</b>									
DISTANCE (>80%)	104%	1,307	6%	1,750	8%	2,000	9%	2,300	10%
HYBRID (50%-79%)	153%	309	1%	350	2%	370	2%	400	2%
TRADITIONAL (<50%)	-3%	20,952	93%	20,320	91%	20,330	90%	20,060	88%
<b>TOTAL</b>	<b>0%</b>	<b>22,568</b>	<b>100%</b>	<b>22,420</b>	<b>100%</b>	<b>22,700</b>	<b>100%</b>	<b>22,760</b>	<b>100%</b>
<b>GRADUATE</b>									
DISTANCE (80%)	-7%	357	7%	400	8%	450	8%	525	10%
HYBRID (50%-79%)	-11%	153	3%	130	2%	140	3%	155	3%
TRADITIONAL (<50%)	-3%	4,803	90%	4,735	90%	4,835	89%	4,770	87%
<b>TOTAL</b>	<b>-3%</b>	<b>5,313</b>	<b>100%</b>	<b>5,265</b>	<b>100%</b>	<b>5,425</b>	<b>100%</b>	<b>5,450</b>	<b>100%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).



## ENROLLMENT PLANNING (continued)

### Planned Enrollment Plan by Residency and Student Level *(Florida FTE)*

	Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*
<b>STATE FUNDABLE</b>									
<b>Florida Resident</b>									
LOWER	9,513	9,327	9,500	9,600	9,620	9,650	9,675	9,700	0.4%
UPPER	11,690	10,713	11,700	11,850	11,870	11,900	11,950	12,000	0.5%
GRAD I	1,962	2,233	1,965	2,050	2,050	2,070	2,110	2,150	1.9%
GRAD II	1,988	1,941	2,000	2,050	2,070	2,100	2,150	2,200	2.0%
<b>TOTAL</b>	<b>25,153</b>	<b>24,214</b>	<b>25,165</b>	<b>25,550</b>	<b>25,610</b>	<b>25,720</b>	<b>25,885</b>	<b>26,050</b>	<b>0.7%</b>
<b>Non- Resident</b>									
LOWER	580	n/a	585	600	610	620	630	640	1.9%
UPPER	624	n/a	635	650	660	670	680	690	1.7%
GRAD I	562	n/a	565	580	580	590	605	620	1.9%
GRAD II	735	n/a	735	745	750	760	780	800	1.8%
<b>TOTAL</b>	<b>2,501</b>	<b>2,483</b>	<b>2,520</b>	<b>2,575</b>	<b>2,600</b>	<b>2,640</b>	<b>2,695</b>	<b>2,750</b>	<b>1.8%</b>
<b>TOTAL</b>									
LOWER	10,093	n/a	10,085	10,200	10,230	10,270	10,305	10,340	0.5%
UPPER	12,314	n/a	12,335	12,500	12,530	12,570	12,630	12,690	0.6%
GRAD I	2,524	n/a	2,530	2,630	2,630	2,660	2,715	2,770	1.9%
GRAD II	2,723	n/a	2,735	2,795	2,820	2,860	2,930	3,000	1.9%
<b>TOTAL</b>	<b>27,654</b>	<b>26,697</b>	<b>27,685</b>	<b>28,125</b>	<b>28,210</b>	<b>28,360</b>	<b>28,580</b>	<b>28,220</b>	<b>0.8%</b>
<b>NOT STATE FUNDABLE</b>									
LOWER	539	n/a	540	545	550	555	560	565	0.9%
UPPER	658	n/a	670	685	700	715	720	725	1.6%
GRAD I	326	n/a	325	330	330	335	335	340	0.9%
GRAD II	18	n/a	20	20	20	20	20	20	0.0%
<b>TOTAL</b>	<b>1,540</b>		<b>1,555</b>	<b>1,580</b>	<b>1,600</b>	<b>1,625</b>	<b>1,635</b>	<b>1,650</b>	<b>1.2%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note\*: The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.

### Medical Student Headcount Enrollments

<b>Medical Doctorate Headcounts</b>									
RESIDENT	472	471	472	474	472	472	472	472	0.0%
NON-RESIDENT	9	9	9	10	11	8	8	8	-2.5%
<b>TOTAL</b>	<b>481</b>	<b>480</b>	<b>481</b>	<b>484</b>	<b>483</b>	<b>480</b>	<b>480</b>	<b>480</b>	<b>0.0%</b>
<b>Dentistry Headcounts</b>									
RESIDENT									%
NON-RESIDENT									%
<b>TOTAL</b>									%
<b>Veterinary Headcounts</b>									
RESIDENT									%
NON-RESIDENT									%
<b>TOTAL</b>									%



## ACADEMIC PROGRAM COORDINATION

### New Programs For Consideration by University in AY 2014-15

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
<b>MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS</b>						
Nurse Anesthesia	51.3804	HEALTH	FIU	----	50	June 2014
Applied Economics	45.0602	----	----	----	50	Nov. 2014
Risk Management/Insurance	52.1701	GAP	----	----	80	Nov. 2014
Physician Assistant	51.0912	HEALTH	UF, USF	----	120	Nov. 2014
<b>DOCTORAL PROGRAMS</b>						

### New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Digital Media Communication	09.0702	STEM	FAU, FGCU	----	440	Sept. 2015
<b>MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS</b>						
Digital Media Communication	09.0702	STEM	FAU	----	50	Sept. 2015
<b>DOCTORAL PROGRAMS</b>						



## DEFINITIONS

### Performance Based Funding

**Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation**

This metric is based on the percentage of a graduating class of bachelor's degree recipients who are employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded.  
 Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation.  
 Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Median Wages of Bachelor's Graduates Employed Full-time in Florida One Year After Graduation**

This metric is based on annualized Unemployment Insurance (UI) wage data from the fourth fiscal quarter after graduation for bachelor's recipients. UI wage data does not include individuals who are self-employed, employed out of state, employed by the military or federal government, those without a valid social security number, or making less than minimum wage.  
 Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Average Cost per Bachelor's Degree**  
*Instructional costs to the university*

For each of the last four years of data, the annual total undergraduate instructional expenditures were divided by the total fundable student credit hours to create a cost per credit hour for each year. This cost per credit hour was then multiplied by 30 credit hours to derive an average annual cost. The average annual cost for each of the four years was summed to provide an average cost per degree for a baccalaureate degree that requires 120 credit hours.  
 Sources: State University Database System (SUDS), Expenditure Analysis: Report IV (2009-10 through 2012-13).

**Six Year FTIC Graduation Rate**

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Students of degree programs longer than four years (eg, PharmD) are included in the cohorts. Students who are active duty military are not included in the data.  
 Source: State University Database System (SUDS).

**Academic Progress Rate**  
*2nd Year Retention with GPA Above 2.0*

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with had a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer).  
 Source: State University Database System (SUDS).

**University Access Rate**  
*Percent of Undergraduates with a Pell-grant*

This metric is based the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric.  
 Source: State University Database System (SUDS).

**Bachelor's Degrees Awarded within Programs of Strategic Emphasis**  
*(includes STEM)*

This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).  
 Source: State University Database System (SUDS).

**Graduate Degrees Awarded within Programs of Strategic Emphasis**  
*(includes STEM)*

This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included).  
 Source: State University Database System (SUDS).

**Freshmen in Top 10% of High School Class**

Applies to: NCF

Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class.

Source: New College of Florida.

**BOG Choice Metrics****Percent of Bachelor's Degrees Without Excess Hours**

This metric is based on the percentage of baccalaureate degrees awarded within 110% of the credit hours required for a degree based on the Board of Governors Academic Program Inventory.

Note: It is important to note that the statutory provisions of the "Excess Hour Surcharge" (1009.286, FS) have been modified several times by the Florida Legislature, resulting in a phased-in approach that has created three different cohorts of students with different requirements. The performance funding metric data is based on the latest statutory requirements that mandates 110% of required hours as the threshold. In accordance with statute, this metric excludes the following types of student credits (ie, accelerated mechanisms, remedial coursework, non-native credit hours that are not used toward the degree, non-native credit hours from failed, incomplete, withdrawn, or repeated courses, credit hours from internship programs, credit hours up to 10 foreign language credit hours for transfer students in Florida, and credit hours earned in military science courses that are part of the Reserve Officers' Training Corps (ROTC) program).

Source: State University Database System (SUDS).

**Number of Faculty Awards**

This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards. Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).

**National Ranking for Institutional & Program Achievements**

This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

Source: Board of Governors staff review.

**BOT Choice Metrics****Percent of R&D Expenditures Funded from External Sources**  
FAMU

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.

Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

**Bachelor's Degrees Awarded to Minorities**  
FAU, FGCU, FIU

This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code.

Source: State University Database System (SUDS).

**National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News**  
FSU

This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count.

Source: US News and World Report's annual National University rankings.





<b>Percent of Undergraduate Seniors Participating in a Research Course</b> NCF	This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year. Source: New College of Florida.
<b>Number of Bachelor Degrees Awarded Annually</b> UCF	This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once. Source: State University Database System (SUDS).
<b>Total Research Expenditures</b> UF	This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
<b>Percent of Course Sections Offered via Distance and Blended Learning</b> UNF	This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both. Source: State University Database System (SUDS).
<b>Number of Postdoctoral Appointees</b> USF	This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar. Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Percentage of Adult Undergraduates Enrolled</b> UWF	This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified. Source: State University Database System (SUDS).
<b>Preeminent Research University Funding Metrics</b>	
<b>Average GPA and SAT Score</b>	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Public University National Ranking</b>	A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.
<b>Freshman Retention Rate (Full-time, FTIC)</b>	Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.





<b>6-year Graduation Rate</b> (Full-time, FTIC)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1%-2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.
<b>National Academy Memberships</b>	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of \$200 million or more, as reported annually by the National Science Foundation (NSF).
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount.
<b>National Ranking in S.T.E.M. Research Expenditures</b>	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
<b>Patents Awarded</b> (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/20100101->20131231 AND APT/1)".
<b>Doctoral Degrees Awarded Annually</b>	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report. Note: per legislative workpapers, this metric does not include Professional degrees.
<b>Number of Post-Doctoral Appointees</b>	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Endowment Size (\$M)</b>	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.



### Goals Common to All Universities

#### Academic Quality

<b>Avg. SAT Score</b> (for 3 subtests)	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Avg. HS GPA</b>	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
<b>Professional/Licensure Exam First-time Pass Rates</b>	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.

#### Operational Efficiency

<b>Freshman Retention Rate</b>	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see <a href="#">link</a> .
<b>FTIC Graduation Rates</b> In 4 years (or less) In 6 years (or less)	As reported in the 2012-13 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>AA Transfer Graduation Rates</b> In 2 years (or less) In 4 years (or less)	As reported in the 2012-13 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>Average Time to Degree (for FTIC)</b>	This metric is the number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.

#### Return on Investment

<b>Bachelor's Degrees Awarded</b>	This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).
<b>Percent of Bachelor's Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 4H).
<b>Graduate Degrees Awarded</b>	This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).
<b>Percent of Graduate Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).
<b>Annual Gifts Received (\$M)</b>	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at <a href="http://www.cae.org/vse">www.cae.org/vse</a> .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
<b>Endowment (\$M)</b>	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).



## Goals Specific to Research Universities

### Academic Quality

#### Faculty Awards

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

#### National Academy Members

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

#### Number of Post-Doctoral appointees

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).

#### Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures

The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at [link](#)), but now data must be queried via WebCASPAR – see [link](#).

### Return on Investment

#### Total Research Expenditures (\$M)

Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Science & Engineering Research Expenditures in non-medical/health sciences

This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see [link](#), table 36 *minus* table 52), but now data must be queried via WebCASPAR.

#### Percent of R&D Expenditures funded from External Sources

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.  
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Patents Issued

The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).

#### Licenses/Options Executed

Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).

#### Licensing Income Received (\$M)

License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2012-13 Accountability Report (table 6A).

#### Number of Start-up Companies

The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2012-13 Accountability Report (table 6A).

#### National rank is higher than predicted by Financial Resources Ranking

This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.

*based on US News & World Report*



<b>Research Doctoral Degrees Awarded</b>	The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).
<b>Professional Doctoral Degrees Awarded</b>	The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

### Student Debt Summary

#### Percent of Bachelor's Recipients with Debt

This is the percentage of bachelor's graduates in a given academic year who entered the university as a first-time-in-college (FTIC) student and who borrowed through any loan programs (institutional, state, Federal Perkins, Federal Stafford Subsidized and unsubsidized, private) that were certified by your institution - excludes parent loans.  
Source: Common Dataset (H4).

#### Average Amount of Debt for Bachelor's who have graduated with debt

This is the average amount of cumulative principal borrowed (from any loan program certified by the institution) for each native, FTIC bachelor's recipient in a given academic year that graduated with debt – see metric definition above. This average does NOT include students who did not enter a loan program that was certified by the institution.  
Source: Common Dataset (H5).

#### Student Loan Cohort Default Rate (3rd Year)

Student loan cohort default rate (CDR) data includes undergraduate and graduate students, and refers to the three federal fiscal year period when the borrower enters repayment and ends on the second fiscal year following the fiscal year in which the borrower entered repayment. Cohort default rates are based on the number of borrowers who enter repayment, not the number and type of loans that enter repayment. A borrower with multiple loans from the same school whose loans enter repayment during the same cohort fiscal year will be included in the formula only once for that cohort fiscal year. Default rate debt includes: Federal Stafford Loans, and Direct Stafford/Ford Loans – for more information see:  
<http://ifap.ed.gov/DefaultManagement/CDRGuideMaster.html>.

Three Year CDR			
Cohort Fiscal Year	Year Published	Borrowers in the Numerator Borrowers in the Denominator	3-Yr Time Period (Numerator) 1-Yr Time Period (Denominator)
2009	2012	Borrowers who entered repayment in 2009 and defaulted in 2009, 2010 or 2011 Borrowers who entered repayment in 2009	10/01/2008 to 9/30/2011 10/01/2008 to 9/30/2009
2010	2013	Borrowers who entered repayment in 2010 and defaulted in 2010, 2011 or 2012 Borrowers who entered repayment in 2010	10/01/2009 to 9/30/2012 10/01/2009 to 9/30/2010
2011	2014*	Borrowers who entered repayment in 2011 and defaulted in 2011, 2012 or 2013 Borrowers who entered repayment in 2011	10/01/2010 to 9/30/2013 10/01/2010 to 9/30/2011
2012	2015	Borrowers who entered repayment in 2012 and defaulted in 2012, 2013 or 2014 Borrowers who entered repayment in 2012	10/01/2011 to 9/30/2014 10/01/2011 to 9/30/2012
2013	2016	Borrowers who entered repayment in 2013 and defaulted in 2013, 2014 or 2015 Borrowers who entered repayment in 2013	10/01/2012 to 9/30/2015 10/01/2012 to 9/30/2013
2014	2017	Borrowers who entered repayment in 2014 and defaulted in 2014, 2015 or 2016 Borrowers who entered repayment in 2014	10/01/2013 to 9/30/2016 10/01/2013 to 9/30/2014
2015	2018	Borrowers who entered repayment in 2015 and defaulted in 2015, 2016 or 2017 Borrowers who entered repayment in 2015	10/01/2014 to 9/30/2017 10/01/2014 to 9/30/2015

# UF

## 2014-15 Work Plan



**University of Florida**

*Work Plan Presentation for 2014-15 Board of Governors Review*

STATE UNIVERSITY SYSTEM *of* FLORIDA | **Board of Governors**





## INTRODUCTION

*The State University System of Florida has developed three tools that aid in guiding the System's future.*

- 1) The Board of Governors' new Strategic Plan 2012-2025 is driven by goals and associated metrics that stake out where the System is headed;*
- 2) The Board's Annual Accountability Report provides yearly tracking for how the System is progressing toward its goals;*
- 3) Institutional Work Plans connect the two and create an opportunity for greater dialogue relative to how each institution contributes to the System's overall vision.*

*These three documents assist the Board with strategic planning and with setting short-, mid- and long-term goals. They also enhance the System's commitment to accountability and driving improvements in three primary areas of focus: 1) academic quality, 2) operational efficiency, and 3) return on investment.*

*The Board will use these documents to help advocate for all System institutions and foster even greater coordination with the institutions and their Boards of Trustees.*

*Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.*



## TABLE OF CONTENTS

### **1. STRATEGY**

- a. Mission Statement
- b. Vision Statement
- c. Statement of Strategy
- d. Strengths and Opportunities
- e. Key Initiatives & Investments

### **2. PERFORMANCE BASED FUNDING METRICS**

### **3. PREEMINENT RESEARCH UNIVERSITY METRICS**

### **4. OTHER KEY PERFORMANCE INDICATORS**

- a. Goals Common to All Universities
- b. Goals Specific to Research Universities
- c. Institution Specific Goals

### **5. OPERATIONS**

- a. Fiscal Information (*includes Tuition Differential Fee Request*)
- b. Enrollment Planning
- c. Academic Program Coordination

### **6. DEFINITIONS**





## MISSION STATEMENT (What is your purpose?)

The University of Florida is a comprehensive learning institution built on a land grant foundation. We are The Gator Nation, a diverse community dedicated to excellence in education and research and shaping a better future for Florida, the nation and the world.

Our mission is to enable our students to lead and influence the next generation and beyond for economic, cultural and societal benefit.

## VISION STATEMENT (What do you aspire to?)

UF aspires to become a U.S. top-ten public research university. UF will leverage its resources effectively to provide maximum return on investment to the state, the nation, and the world. UF will provide exceptional undergraduate, graduate, and professional education on its residential campus and promote its reputation internationally through state of the art online education. UF will build a world-class faculty to engage students and to pursue vigorous externally funded research programs with global impact. These will lead to new discoveries and inventions, enabling UF to build on its excellent national ranking in technology transfer and licensing. This will spur new businesses and state economic development to accompany UF's emphasis on service and outreach to State citizens.

## STATEMENT OF STRATEGY (How will you get there?)

*Given your mission, vision, strengths and available resources, provide a brief description of your market and your strategy for addressing and leading it.*

UF competes with the top twenty public research universities in the nation for talent. To rise into the top ten, UF will assume a leadership position in a strategically selected subset of disciplines and endeavors through investment of resources appropriated in the preeminence legislation. With the addition of over 120 new faculty members, UF will strengthen undergraduate and graduate student recruitment, doctoral education, research programs and online education. These thrusts will be supported by vigorous outreach and branding efforts, technology transfer and licensing programs, and economic development initiatives.



## STRENGTHS AND OPPORTUNITIES *(within 3 years)*

*What are your core capabilities, opportunities and challenges for improvement?*

UF is well positioned to tackle large interdisciplinary projects such as Big Data, Aging, Emerging Pathogens, and Metabolomics. UF is recruiting teams of senior researchers in these and other fields to raise existing groups from “strong” to “preeminent.” UF is capitalizing on its rapidly growing distance education enterprise with the advent of UF Online to increase the university’s visibility and to provide increased access to high quality undergraduate education. UF is placing increasing emphasis on its research and technology transfer enterprise to create and foster new businesses and to attract new industry into the state.

## KEY INITIATIVES & INVESTMENTS *(within 3 years)*

*Describe your top three key initiatives for the next three years that will drive improvement in Academic Quality, Operational Efficiency, and Return on Investment.*

1 With the approval of the preeminence legislation, UF will focus on actions needed to advance UF as one of the nation’s top public research universities. This will involve wise investment into strategically selected research groups and doctoral education. It will also be important to foster an internal focus on this initiative and on efforts to encourage interdisciplinary collaboration to tackle problems of national and global significance. UF will also address other areas to achieve top status, including graduation rates, federal grants and contracts, tech transfer, economic development, faculty awards and recognition, etc. UF will employ Academic Analytics software to help measure research productivity and to help guide new investment decisions.

2 UF will continue to implement and build UF Online. Its mission is to increase access to high quality online undergraduate degrees for Floridians and nonresidents. This initiative was launched successfully in January and joined the extensive online graduate and professional education program that has been a successful ongoing enterprise for several decades. Over the next five years, UF will build the number of majors available through UF Online and will enlarge the program substantially through marketing, advertising, recruiting, and provision of a high quality academic and student services program.

3 The preeminence legislation authorized UF to develop and administer a set of core courses for lower division students. The intent of this initiative is to provide a signature UF experience that serves to introduce students to important subject matter and that provides a common student experience to help the freshman class to bond. The humanities course “What is the Good Life?” is the first in the series and has been successfully delivered to all UF freshmen. Additional courses have been proposed in the sciences and in the social sciences. UF will develop these course offerings and round out the signature core course offerings over the next several years.



## PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Metrics Common To All Universities</b>						
<b>Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation</b>	-5%	63%	63%	65%	65%	65%
<b>Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation</b>	n/a	\$33,100	\$33,100	\$34,000	\$34,000	\$35,000
<b>Average Cost per Bachelor's Degree</b> [Instructional Costs to the University]	n/a	\$24,960	\$24,960	\$24,960	\$24,960	\$24,960
<b>FTIC 6 year Graduation Rate</b> [Includes full- and part-time students]	1%	86%	86%	86%	87%	87%
<b>Academic Progress Rate</b> [FTIC 2 year Retention Rate with GPA≥2 ]	1%	96%	96%	96%	97%	97%
<b>University Access Rate</b> [Percent of Fall Undergraduates with a Pell grant]	0%	32%	32%	32%	32%	32%
<b>Bachelor's Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	-5%	52%	52%	52%	53%	53%
<b>Graduate Degrees Awarded Within Programs of Strategic Emphasis</b> [Based on list approved by BOG at 11/2013 meeting]	3%	69%	69%	69%	70%	70%
<b>Board of Governors Choice Metric</b>						
<b>Number of Faculty Awards</b> [for FSU and UF only]	-18.2%	18	19	20	21	23
<b>Board of Trustees Choice Metric</b>						
Total Research Expenditures	-0.3%	\$695M	\$695M	\$695M	\$709M	\$723M

Note: Metrics are defined in appendix.



## PREEMINENT RESEARCH UNIVERSITY FUNDING METRICS

The Board of Governors shall designate each state research university that meets at least 11 of the 12 following academic and research excellence standards as a preeminent state research university. For this year, the University of Florida and Florida State University are the only universities required to complete the table below. The Board of Governors will consider the shaded 2014 actual data for approval.

	BENCH- MARKS	2014 ACTUAL	2015 GOALS	2016 GOALS	2017 GOALS	2018 GOALS
<b>Average GPA and SAT Score</b> for incoming freshman in Fall semester	<b>4.0 GPA</b> <b>1800 SAT</b>	4.3 1922	4.3 1925	4.3 1927	4.3 1929	4.3 1931
<b>Public University National Ranking</b> (in more than one national ranking)	<b>Top 50</b>	4	4	4	4	4
<b>Freshman Retention Rate</b> (Full-time, FTIC)	<b>90%</b>	96%	96%	97%	97%	97%
<b>6-year Graduation Rate</b> (Full-time, FTIC)	<b>70%</b>	87%	87%	87%	87%	87%
<b>National Academy Memberships</b>	<b>6</b>	23	23	23	24	24
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	<b>\$200M</b>	\$643M	\$643M	\$643M	\$655M	\$668M
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	<b>\$150M</b>	\$472M	\$522M	\$522M	\$532M	\$543M
<b>National Ranking in S.T.E.M. Research Expenditures</b> (includes public & private institutions)	<b>Top 100</b> in 5 of 8 disciplines	8	8	8	9	9
<b>Patents Awarded</b> (over 3 year period)	<b>100</b>	231	323	327	333	333
<b>Doctoral Degrees Awarded Annually</b> (Does not include Professional degrees)	<b>400</b>	742	742	742	742	742
<b>Number of Post-Doctoral Appointees</b>	<b>200</b>	648	648	648	648	648
<b>Endowment Size (\$M)</b>	<b>\$500M</b>	\$1.36B	\$1.48B	\$1.55B	\$1.62B	\$1.7B
<b>NUMBER OF METRICS ABOVE THE BENCHMARK</b>	<b>11 of 12</b>	<b>12</b>				

Note: Due to the various timelines that these data represent, the data reported in each column corresponds to the most updated data for the June Board meeting each year. Metrics are defined in appendix.



## KEY PERFORMANCE INDICATORS

The Board of Governors has selected the following Key Performance Indicators from its 2012-2025 System Strategic Plan and from accountability metrics identified by the Florida Legislature. The Key Performance Indicators emphasize three primary areas of focus: **Academic Quality, Operational Efficiency, and Return on Investment**. The indicators address common goals across all universities while also providing flexibility to address institution-specific goals from a list of metrics in the 2012-2025 System Strategic Plan.

The Goals Specific to Research Universities apply only to those universities classified by the Carnegie Foundation for the Advancement of Teaching as being a 'Research University'<sup>1</sup>, which includes Florida A&M University (by university request), Florida Atlantic University, Florida International University, Florida State University, University of Central Florida, University of Florida, and the University of South Florida.

---

<sup>1</sup> The Carnegie Foundation for the Advancement of Teaching has developed a well-respected system of categorizing postsecondary institutions that includes consideration of each doctorate-granting university's research activities – for more information see [link](#).



## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Common to All Universities

#### Academic Quality

##### National Ranking for University and Programs

Consistent with UF's goal to become a "top 10 public," UF will invest appropriated funds to hire new faculty in key areas and to improve the impact of its doctoral and professional education programs. Other areas that will receive attention: improved performance in winning federal grants; 6-year graduation rate; faculty awards and recognition; licensing and technology transfer success linked to economic development. UF will increasingly direct its attention to multidisciplinary problems and projects with high national and international impact.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>SAT Score</b> [for 3 subtests]	-1%	1922	1925	1927	1929	1931
<b>High School GPA</b>	2%	4.3	4.3	4.3	4.3	4.3
<b>Professional/Licensure Exam First-time Pass Rates<sup>1</sup></b>						
Exams Above Benchmarks	n/a	11	11	11	11	11
Exams Below Benchmarks	n/a	0	0	0	0	0
<b>Operational Efficiency</b>						
<b>Freshman Retention Rate</b>	0%	96%	96%	96%	97%	97%
<b>FTIC Graduation Rates</b>						
In 4 years (or less)	8%	66%	67%	67%	68%	68%
In 6 years (or less)	4%	86%	86%	87%	87%	87%
<b>AA Transfer Graduation Rates</b>						
In 2 years (or less)	-3%	40%	43%	43%	44%	44%
In 4 years (or less)	5%	86%	86%	86%	86%	86%
<b>Average Time to Degree (for FTIC)</b>	0.0 yrs	4.1 yrs	4.1 yrs	4.1 yrs	4.1 yrs	4.1 yrs
<b>Return on Investment</b>						
<b>Bachelor's Degrees Awarded</b>	-10%	8,245	8,245	8,245	8,245	8,245
<b>Percent of Bachelor's Degrees in STEM</b>	7%	33%	34%*	34%*	36%*	36%*
<b>Graduate Degrees Awarded</b>	6%	5,981	5,981	5,981	5,981	5,981
<b>Percent of Graduate Degrees in STEM</b>	6%	36%	32%*	32%*	34%*	34%*
<b>Annual Gifts Received (\$M)</b>	0.81%	\$211M	\$215M	\$225M	\$235M	\$245M
<b>Endowment (\$M)</b>	6%	\$1,360M	\$1,480M	\$1,550M	\$1,620M	\$1,700M

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.

\*Based on revised strategic emphasis CIPs approved by BOG at 11/2013 meeting. Graduate programs in dental clinical sciences, pharmaceutical sciences and veterinary sciences are now included in the health category.



## KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

### Goals Specific to Research Universities

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
<b>Academic Quality</b>						
Faculty Awards	-25%	18	19	20	21	23
National Academy Members	10%	23	23	23	23	24
Number of Post-Doctoral Appointees*	8%	648	648	680	690	690
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures*	n/a	8 of 8	8 of 8	8 of 8	8 of 8	8 of 8
<b>Return on Investment</b>						
Total Research Expenditures (\$M) [includes non-Science & Engineering disciplines]	8%	\$ 695M	\$ 695M	\$ 695M	\$ 709M	\$ 723M
Science & Engineering Research Expenditures (\$M)	9%	\$ 643M	\$ 643M	\$ 643M	\$ 655M	\$ 668M
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences (\$M)	3%	\$ 472M	\$ 522M	\$ 522M	\$ 532M	\$ 543M
Percent of Research Expenditures funded from External Sources	51%	51%	51%	51%	51%	51%
Patents Issued	81%	107	106	110	111	112
Licenses/Options Executed	52%	140	118	125	130	130
Licensing Income Received (\$M)	-52%	\$28.0M	\$29.7M	\$30.8M	\$31.7M	\$32.6M
Number of Start-up Companies	67%	16	15	16	17	18
National Rank is Higher than Predicted by the Financial Resources Ranking [based on U.S. News & World Report]	n/a	<u>49</u> 46	<u>49</u> 46	<u>49</u> 46	<u>49</u> 46	<u>49</u> 46
Research Doctoral Degrees Awarded	12%	742	742	742	742	742
Professional Doctoral Degrees Awarded	-10%	1,222	1,222	1,222	1,222	1,222
<b>TOTAL NUMBER OF IMPROVING METRICS</b>		<b>15</b>	<b>9</b>	<b>10</b>	<b>17</b>	<b>11</b>

Note: An asterisk (\*) indicates that 2011-12 is the latest data available for these metrics.





## KEY PERFORMANCE INDICATORS

### Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

	TREND (2008-09 to 2012-13)	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
Bachelor's Degrees in Areas of Strategic Emphasis	7%	4,019	4,437*	4,437*	4,450*	4,450*
Graduate Degrees in Areas of Strategic Emphasis	10%	3,523	4,124*	4,124*	4,140*	4,140*
Percentage of Eligible Programs with Specialized Accreditation	99%	99%	99%	99%	99%	99%

\*Based on revised strategic emphasis CIPs approved by BOG at 11/2013 meeting.

To further distinguish the university's distinctive mission, the university may choose to provide two additional narrative and metric goals that are based on the university's own strategic plan.

#### Goal 1. N/A

Metric	%Δ	xx	xx	xx	xx	xx
Metric	%Δ	xx	xx	xx	xx	xx

#### Goal 2. N/A

Metric	%Δ	xx	xx	xx	xx	xx
Metric	%Δ	xx	xx	xx	xx	xx



## FISCAL INFORMATION

## University Revenues (in Millions of Dollars)

	2013-14 Actual	2014-15 Appropriations*
<b>Education &amp; General – Main Operations</b>		
State Funds	\$342.5	\$371.00
Tuition	\$288.4	n/a
<b>TOTAL MAIN OPERATIONS</b>	<b>\$630.9</b>	<b>n/a</b>
<b>Education &amp; General – Health-Science Center / Medical Schools</b>		
State Funds	\$109.0	\$110.70
Tuition	\$ 38.5	n/a
<b>TOTAL HSC</b>	<b>\$147.5</b>	<b>n/a</b>
<b>Education &amp; General – Institute of Food &amp; Agricultural Sciences (IFAS)</b>		
State Funds	\$144.6	\$153.00
Tuition	\$ -	n/a
<b>TOTAL IFAS</b>	<b>\$144.6</b>	<b>n/a</b>
<b>EDUCATION &amp; GENERAL TOTAL REVENUES</b>	<b>\$923.0</b>	<b>n/a</b>

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year, so are estimated.

\*The 2014-15 appropriations data includes the funds associated with the Performance Based Funding model, which is contingent upon approval by the Board of Governors at their June Board meeting.

## OTHER BUDGET ENTITIES

**Auxiliary Enterprises**

Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues	\$325.2	n/a
----------	---------	-----

**Contracts & Grants**

Resources received from federal, state or private sources for the purposes of conducting research and public service activities.

Revenues	\$998.9	n/a
----------	---------	-----

**Local Funds**

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues	\$515.9	n/a
----------	---------	-----

**Faculty Practice Plans**

Revenues/receipts are funds generated from faculty practice plan activities.

Revenues	\$678.5	n/a
----------	---------	-----

**OTHER BUDGET ENTITY TOTAL REVENUES****\$2,518.5****n/a****UNIVERSITY REVENUES GRAND TOTAL****\$3,441.5****n/a**



## FISCAL INFORMATION (continued)

## Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition	\$3,100	\$3,152	\$3,152	\$3,152	\$3,152
Tuition Differential Fee	\$1,325	\$1,325	\$1,325		
Percent Increase	9%	1.2%	0%	0%	0%
Required Fees <sup>1</sup>	\$1,718	\$1,786	\$1,836	\$1,897	\$1,961
<b>TOTAL TUITION AND FEES</b>	<b>\$6,143</b>	<b>\$6,263</b>	<b>\$6,313</b>		

Note<sup>1</sup>: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

## Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	37%	38%	41%	43%	45%
Average Amount of Debt for Bachelor's who have graduated with debt	\$16,600	\$17,504	\$19,636	\$20,708	\$24,018
NSLDS Cohort Year	2008	2009	2010	2011	2012 GOAL
Student Loan Cohort Default Rate (3rd Year)	3.5%	3.8%	3.7%*	n/a	n/a

\*The 2010 cohort data are an estimate.

## Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$6,263	\$1,080	\$9,520	\$1,110	\$2,240	\$20,213
AT HOME	\$6,263	\$1,080	\$1,090	\$1,110	\$2,240	\$11,783

## Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT	
Below \$40,000	7,904	28.33%	\$10,204	(\$3,705)	\$9,975	\$2,833	
\$40,000-\$59,999	2,604	9.33%	\$13,578	(\$159)	\$6,429	\$3,077	
\$60,000-\$79,999	2,347	8.41%	\$15,660	\$2,300	\$3,970	\$3,360	
\$80,000-\$99,999	2,088	7.48%	\$16,229	\$3,010	\$3,260	\$3,186	
\$100,000 Above	9,957	35.69%	\$16,330	\$3,312	\$2,958	\$1,824	
Missing*	2,996	10.74%	n/a	\$3,624	\$2,646	\$82	
TOTAL	27,896	100%	AVERAGE	\$14,400*	\$1,397	\$4,873	\$2,394

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) minus the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) minus the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note\*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

Effective Date	
University Board of Trustees approval date:	n/a
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	n/a
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$44.17
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0%
\$ Increase in tuition differential per credit hour:	\$0
\$ Increase in tuition differential for 30 credit hours:	\$0
Projected Differential Revenue Generated	
Incremental revenue generated in 2014-15 (projected):	\$0
Total differential fee revenue generated in 2014-15 (projected):	\$28,448,033
Intended Uses	
n/a	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
n/a	
Request to Modify or Waive Tuition Differential Uses (pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)	
n/a	



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2013-14 academic year.

2013-2014 - 70% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Fund faculty/instructors to provide instruction and improve student-faculty ratio	Since the implementation of the Differential Tuition, a total of 125 Faculty have been hired or retained. We continue to advertise for additional faculty from commitments made from these funds. There are currently three positions being advertised.
Fund advisors to provide student advising	Since the implementation of the Differential Tuition, a total of three advisors have been hired.
These funds will also be used to fund specific undergraduate programs	Departments have been provided funds to support various undergraduate programs.
Provide funding to replace budget reductions from FY13	Colleges have been provided funds to support undergraduate programs that would have been negatively impacted by the budget reductions.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	125
Total Number of Advisors Hired or Retained (funded by tuition differential):	3
Total Number of Course Sections Added or Saved (funded by tuition differential):	1,298
2013-2014 - 30% Initiatives (list the initiatives provided in the 2013-14 tuition differential request)	University Update on Each Initiative
Need-based grants for undergraduate students with financial need	Funds were awarded as need-based grants in the Florida Opportunity Scholars Program to Florida resident, first-generation-in-college, undergraduate students, with total family income generally less than \$40,000 per year.
Additional Information (estimates as of April 30, 2014):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	1,274
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$6,761
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$164
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$17,389



**FISCAL INFORMATION (continued)**  
**TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,**  
**& AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15**

**University Tuition Differential**

Budget Entity: 48900100 (Educational &amp; General)

SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)

	<b>Estimated Actual*</b> <b>2013-14</b>	<b>Estimated</b> <b>2014-15</b>
	-----	-----
<b><u>FTE Positions:</u></b>		
Faculty	146.00	154.00
Advisors	4.00	4.00
Staff	5.00	5.00
Total FTE Positions:	155.00	163.00
<b><u>Balance Forward from Prior Periods</u></b>		
Balance Forward	\$ 2,219,434	\$ 3,112,335
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ 2,219,434	\$ 3,112,335
<b><u>Receipts / Revenues</u></b>		
Tuition Differential Collections	\$ 28,448,033	28,448,033
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 28,448,033	\$ 28,448,033
<b><u>Expenditures</u></b>		
Salaries & Benefits	\$ 19,877,275	\$ 21,537,480
Other Personal Services	28,360	-
Expenses	217	-
Operating Capital Outlay	-	-
Student Financial Assistance	6,600,000	6,600,000
Expended From Carryforward Balance	1,049,280	2,161,000
**Other Category Expenditures	-	-
Total Expenditures:	\$ 27,555,132	\$ 30,298,480
<b>Ending Balance Available:</b>	<b>\$ 3,112,335</b>	<b>\$ 1,261,888</b>

\*Since the 2013-14 year has not been completed, provide an estimated actual.

\*\*Provide details for "Other Categories" used.



## FISCAL INFORMATION (continued)

### UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<b>University: University of Florida</b>							
<b><u>Undergraduate Students</u></b>	<b>-----Actual-----</b>			<b>-----Projected-----</b>			
	<b>2011-12</b>	<b>2012-13</b>	<b>2013-14</b>	<b>2014-15</b>	<b>2015-16</b>	<b>2016-17</b>	<b>2017-18</b>
<b><u>Tuition:</u></b>							
Base Tuition - (0% inc. for 2014-15 to 2017-18)	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07	\$105.07
Tuition Differential	\$32.00	\$44.17	\$44.17	\$44.17			
<b>Total Base Tuition &amp; Differential per Credit Hour</b>	<b>\$135.32</b>	<b>\$147.49</b>	<b>\$149.24</b>	<b>\$149.24</b>	<b>\$105.07</b>	<b>\$105.07</b>	<b>\$105.07</b>
% Change		9.0%	1.2%	0.0%			
<b><u>Fees (per credit hour):</u></b>							
Student Financial Aid <sup>1</sup>	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Capital Improvement <sup>2</sup>	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$14.55	\$16.06	\$17.35	\$18.19	\$19.06	\$19.97	\$20.93
Health	\$13.82	\$13.82	\$14.11	\$14.93	\$15.80	\$16.71	\$17.67
Athletic	\$1.90	\$1.90	\$1.90	\$1.90	\$1.90	\$1.90	\$1.90
Transportation Access	\$7.88	\$8.41	\$8.91	\$8.91	\$9.22	\$9.54	\$9.87
Technology <sup>1</sup>	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
<b>Total Fees</b>	<b>\$53.23</b>	<b>\$57.27</b>	<b>\$59.53</b>	<b>\$61.19</b>	<b>\$63.24</b>	<b>\$65.38</b>	<b>\$67.63</b>
<b>Total Tuition and Fees per Credit Hour</b>	<b>\$188.55</b>	<b>\$204.76</b>	<b>\$208.77</b>	<b>\$210.43</b>			
% Change		8.6%	2.0%	0.8%			
<b><u>Fees (block per term):</u></b>							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
List any new fee proposed							
<b>Total Block Fees per term</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>
% Change		0.0%	0.0%	0.0%			
<b>Total Tuition for 30 Credit Hours</b>	<b>\$4,059.60</b>	<b>\$4,424.70</b>	<b>\$4,477.20</b>	<b>\$4,477.20</b>			
<b>Total Fees for 30 Credit Hours</b>	<b>\$1,596.90</b>	<b>\$1,718.10</b>	<b>\$1,785.90</b>	<b>\$1,835.70</b>	<b>\$1,897.20</b>	<b>\$1,961.40</b>	<b>\$2,028.90</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$5,656.50</b>	<b>\$6,142.80</b>	<b>\$6,263.10</b>	<b>\$6,312.90</b>			
\$ Change		\$486.30	\$120.30	\$49.80			
% Change		8.6%	2.0%	0.8%			
<b><u>Out-of-State Fees</u></b>							
Out-of-State Undergraduate Fee	\$707.21	\$707.21	\$707.21	\$707.21	\$707.21	\$707.21	\$707.21
Out-of-State Undergraduate Student Financial Aid <sup>3</sup>	\$35.36	\$35.36	\$35.36	\$35.36	\$35.36	\$35.36	\$35.36
Total per credit hour	\$742.57	\$742.57	\$742.57	\$742.57	\$742.57	\$742.57	\$742.57
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
<b>Total Tuition for 30 Credit Hours</b>	<b>\$25,275.90</b>	<b>\$25,641.00</b>	<b>\$25,693.50</b>	<b>\$25,693.50</b>			
<b>Total Fees for 30 Credit Hours</b>	<b>\$2,657.70</b>	<b>\$2,778.90</b>	<b>\$2,846.70</b>	<b>\$2,896.50</b>	<b>\$2,958.00</b>	<b>\$3,022.20</b>	<b>\$3,089.70</b>
<b>Total Tuition and Fees for 30 Credit Hours</b>	<b>\$27,933.60</b>	<b>\$28,419.90</b>	<b>\$28,540.20</b>	<b>\$28,590.00</b>			
\$ Change		\$486.30	\$120.30	\$49.80			
% Change		1.7%	0.4%	0.2%			
<b><u>Housing/Dining<sup>4</sup></u></b>	<b>\$8,800.00</b>	<b>\$9,370.00</b>	<b>\$9,520.00</b>	<b>\$9,630.00</b>	<b>\$9,967.00</b>	<b>\$10,316.00</b>	<b>\$10,677.00</b>
\$ Change		\$570.00	\$150.00	\$110.00	\$337.00	\$349.00	\$361.00
% Change		6.5%	1.6%	1.2%	3.5%	3.5%	3.5%

<sup>1</sup> can be no more than 5% of tuition.<sup>3</sup> can be no more than 5% of tuition and the out-of-state fee.<sup>2</sup> as approved by the Board of Governors.<sup>4</sup> combine the most popular housing and dining plans provided to students





## ENROLLMENT PLANNING

### Planned Enrollment Growth by Student Type *(for all E&G students at all campuses)*

	5 YEAR TREND (2008-13)	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	-3.1%	26,223	52.8%	27,099	53.2%	28,004	53.6%	28,940	54.0%
FTIC (Profile Admit)									
AA Transfers*	-12.5%	5,283	10.6%	5,460	10.7%	5,642	10.8%	5,830	10.9%
Other Transfers	-31.7%	869	1.7%	898	1.8%	928	1.8%	959	1.8%
Subtotal	-5.8%	32,375	65.2%	33,457	65.7%	34,574	66.2%	35,730	66.6%
GRADUATE STUDENTS									
Master's	4.7%	7,204	14.5%	7,288	14.3%	7,372	14.1%	7,458	13.9%
Research Doctoral	-8.8%	4,283	8.6%	4,333	8.5%	4,383	8.4%	4,434	8.3%
Professional Doctoral	-2.3%	1,597	3.2%	1,616	3.2%	1,634	3.1%	1,653	3.1%
Subtotal	-1.0%	13,084	26.3%	13,236	26.0%	13,389	25.6%	13,545	25.3%
NOT-DEGREE SEEKING	16.8%	1,791	3.6%	1,851	3.6%	1,913	3.7%	1,977	3.7%
MEDICAL	0.1%	2,410	4.9%	2,368	4.7%	2,368	4.5%	2,368	4.4%
TOTAL	-3.6%	49,660	100.0%	50,911	100.0%	52,245	100.0%	53,619	100.0%

Note\*: AA transfers refer only to transfers from the Florida College System.

### Planned Enrollment Growth by Method of Instruction *(for all E&G students at all campuses)*

	2 YEAR TREND (2010-11 to 2012-13)	2012-13		2014-15		2015-16		2016-17	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
<b>UNDERGRADUATE</b>									
DISTANCE (>80%)	52.7%	4,847	20.6%	6,334	25.2%	7,467	29.0%	9,393	35.7%
HYBRID (50%-79%)	-29.1%	366	1.6%	502	2.0%	386	1.5%	263	1.0%
TRADITIONAL (<50%)	-8.9%	18,364	77.9%	18,284	72.8%	17,909	69.5%	16,648	63.3%
<b>TOTAL</b>	<b>-1.1%</b>	<b>23,576</b>	<b>100.0%</b>	<b>25,121</b>	<b>100.0%</b>	<b>25,762</b>	<b>100.0%</b>	<b>26,304</b>	<b>100.0%</b>
<b>GRADUATE</b>									
DISTANCE (80%)	105.7%	1,674	18.5%	1,772	20.0%	1,907	21.5%	1,953	22.0%
HYBRID (50%-79%)	-20.9%	225	2.5%	133	1.5%	89	1.0%	44	0.5%
TRADITIONAL (<50%)	-13.9%	7,166	79.1%	6,954	78.5%	6,873	77.5%	6,881	77.5%
<b>TOTAL</b>	<b>-3.8%</b>	<b>9,065</b>	<b>100.0%</b>	<b>8,859</b>	<b>100.0%</b>	<b>8,869</b>	<b>100.0%</b>	<b>8,879</b>	<b>100.0%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).



## ENROLLMENT PLANNING (continued)

### Planned Enrollment Plan by Residency and Student Level (Florida FTE)

	Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*
<b>STATE FUNDABLE</b>									
<b>Florida Resident</b>									
LOWER	9,673	10,122	10,122	10,223	10,323	10,423	10,523	10,623	1.0%
UPPER	13,239	13,852	13,852	14,052	14,152	14,452	14,802	15,252	1.9%
GRAD I	1,910	1,981	1,981	1,981	1,981	1,981	1,981	1,981	0.0%
GRAD II	3,639	3,830	3,830	3,830	3,830	3,830	3,830	3,830	0.0%
<b>TOTAL</b>	<b>28,461</b>	<b>29,785</b>	<b>29,785</b>	<b>30,086</b>	<b>30,286</b>	<b>30,686</b>	<b>31,136</b>	<b>31,686</b>	<b>1.2%</b>
<b>Non- Resident</b>									
LOWER	449		492	531	574	620	669	723	8.0%
UPPER	474		655	955	1,255	1,555	1,855	2,155	26.9%
GRAD I	1,248		1,249	1,250	1,251	1,253	1,254	1,255	0.1%
GRAD II	1,781		1,799	1,808	1,817	1,826	1,835	1,844	0.5%
<b>TOTAL</b>	<b>3,951</b>	<b>4,049</b>	<b>4,195</b>	<b>4,544</b>	<b>4,897</b>	<b>5,253</b>	<b>5,613</b>	<b>5,977</b>	<b>7.3%</b>
<b>TOTAL</b>									
LOWER	10,122	10,122	10,614	10,755	10,897	11,043	11,193	11,346	1.3%
UPPER	13,713	13,852	14,507	15,007	15,407	16,007	16,657	17,407	3.7%
GRAD I	3,157	1,981	3,230	3,231	3,232	3,234	3,235	3,236	0.0%
GRAD II	5,420	3,830	5,629	5,638	5,647	5,656	5,665	5,674	0.2%
<b>TOTAL</b>	<b>32,411</b>	<b>33,834</b>	<b>33,980</b>	<b>34,630</b>	<b>35,183</b>	<b>35,939</b>	<b>36,749</b>	<b>37,663</b>	<b>2.1%</b>
<b>NOT STATE FUNDABLE</b>									
LOWER	181	n/a	183	185	186	188	190	192	1.0%
UPPER	429	n/a	434	438	442	447	451	456	1.0%
GRAD I	1,551	n/a	1,597	1,645	1,694	1,745	1,797	1,851	3.0%
GRAD II	395	n/a	395	395	395	395	395	395	0.0%
<b>TOTAL</b>	<b>2,555</b>	<b>n/a</b>	<b>2,608</b>	<b>2,662</b>	<b>2,718</b>	<b>2,775</b>	<b>2,834</b>	<b>2,894</b>	<b>2.1%</b>

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note\*: The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.

### Medical Student Headcount Enrollments

<b>Medical Doctorate Headcounts</b>									
RESIDENT	524	513	513	513	513	513	513	513	0.0%
NON-RESIDENT	6		27	27	27	27	27	27	0.0%
<b>TOTAL</b>	<b>530</b>	<b>513</b>	<b>540</b>	<b>540</b>	<b>540</b>	<b>540</b>	<b>540</b>	<b>540</b>	<b>0.0%</b>
<b>Dentistry Headcounts</b>									
RESIDENT	322	321	321	321	321	321	321	321	0.0%
NON-RESIDENT	8		10	10	10	10	10	10	0.0%
<b>TOTAL</b>	<b>330</b>	<b>321</b>	<b>331</b>	<b>331</b>	<b>331</b>	<b>331</b>	<b>331</b>	<b>331</b>	<b>0.0%</b>
<b>Veterinary Headcounts</b>									
RESIDENT	355	332	344	344	344	344	344	344	0.0%
NON-RESIDENT	0		0	0	0	0	0	0	0.0%
<b>TOTAL</b>	<b>382</b>	<b>332</b>	<b>344</b>	<b>344</b>	<b>344</b>	<b>344</b>	<b>344</b>	<b>344</b>	<b>0.0%</b>



## ACADEMIC PROGRAM COORDINATION

## New Programs For Consideration by University in AY 2014-15

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Marine Sciences	26.1302		FIU, UWF	10%	175	Fall 2014
Civil Eng Technology	15.0201		None	100%	300	Fall 2014
Biomed Eng Tech	15.0401		None	100%	300	Fall 2014
<b>MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS</b>						
Arts in Medicine	50.0799		None	Yes	30	Spring 2014
Entrepreneurship	52.0701		USF	TBD	40	Spring 2014
ISOM	11.0501		FAU, FGCU, FIU, FSU	TBD	250	Spring 2014
International Bus	52.1101		FAU, FIU	TBD	150	Spring 2014
<b>DOCTORAL PROGRAMS</b>						
Comp Science	11.0101		FAU, FIU, FSU, UCF	No	120	Fall 2014

## New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
<b>BACHELOR'S PROGRAMS</b>						
Mass Comm	09.0102		FGCU, FIU, USFT, USFSP, UWF	100%	550	Fall 2015
Comp Eng Technology	15.1201		None	100%	300	Fall 2016
Environ Eng Technology	15.0507		None	100%	300	Fall 2015
Mech Eng Technology	15.0805		None	100%	300	Fall 2015
Indus Eng Technology	15.0612		None	100%	300	Fall 2015
Mfg Eng Technology	15.0613		None	100%	300	Fall 2016
Comm Studies	09.0100		FAU, FIU, UCF	100%	35	Fall 2016
Environ Analysis/Design	04.0401		None	No	20	Fall 2016
Educational Technology	13.0501		None	100%	30	Fall 2016
Marine Sciences	30.0201		FIU, UWF	TBD	100	Spring 2015
Ag Operations Mgmt	01.0106		None	TBD	40	Spring 2015
Public Health	51.2201		None	TBD	95	Fall 2016

**MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS**

Dance	50.0301	FSU	No	25	Fall 2016
Case Management	51.0001	None	Yes	40	Fall 2016
Human-Centered Comp	11.0104	None	No	20	Fall 2015
Advanced Legal Research	22.0201	None	Yes	25	Fall 2016

**DOCTORAL PROGRAMS**

Human-Centered Comp	11.0104	None	No	50	Fall 2015
Family, Youth & Comm Sciences	19.0707	UCF, USF, FSU	No	20	Fall 2015



## DEFINITIONS

### Performance Based Funding

**Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation**

This metric is based on the percentage of a graduating class of bachelor's degree recipients who are employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded.

Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation.

Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Median Wages of Bachelor's Graduates Employed Full-time in Florida One Year After Graduation**

This metric is based on annualized Unemployment Insurance (UI) wage data from the fourth fiscal quarter after graduation for bachelor's recipients. UI wage data does not include individuals who are self-employed, employed out of state, employed by the military or federal government, those without a valid social security number, or making less than minimum wage. Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.

**Average Cost per Bachelor's Degree**  
*Instructional costs to the university*

For each of the last four years of data, the annual total undergraduate instructional expenditures were divided by the total fundable student credit hours to create a cost per credit hour for each year. This cost per credit hour was then multiplied by 30 credit hours to derive an average annual cost. The average annual cost for each of the four years was summed to provide an average cost per degree for a baccalaureate degree that requires 120 credit hours. Sources: State University Database System (SUDS), Expenditure Analysis: Report IV (2009-10 through 2012-13).

**Six Year FTIC Graduation Rate**

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Students of degree programs longer than four years (eg, PharmD) are included in the cohorts. Students who are active duty military are not included in the data. Source: State University Database System (SUDS).

**Academic Progress Rate**  
*2nd Year Retention with GPA Above 2.0*

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with had a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer). Source: State University Database System (SUDS).

**University Access Rate**  
*Percent of Undergraduates with a Pell-grant*

This metric is based the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric. Source: State University Database System (SUDS).

**Bachelor's Degrees Awarded within Programs of Strategic Emphasis**  
(includes STEM)

This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included). Source: State University Database System (SUDS).

**Graduate Degrees Awarded within Programs of Strategic Emphasis**  
(includes STEM)

This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included). Source: State University Database System (SUDS).

**Freshmen in Top 10% of High School Class**

Applies to: NCF

Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class.

Source: New College of Florida.

**BOG Choice Metrics****Percent of Bachelor's Degrees Without Excess Hours**

This metric is based on the percentage of baccalaureate degrees awarded within 110% of the credit hours required for a degree based on the Board of Governors Academic Program Inventory.

Note: It is important to note that the statutory provisions of the "Excess Hour Surcharge" (1009.286, FS) have been modified several times by the Florida Legislature, resulting in a phased-in approach that has created three different cohorts of students with different requirements. The performance funding metric data is based on the latest statutory requirements that mandates 110% of required hours as the threshold. In accordance with statute, this metric excludes the following types of student credits (ie, accelerated mechanisms, remedial coursework, non-native credit hours that are not used toward the degree, non-native credit hours from failed, incomplete, withdrawn, or repeated courses, credit hours from internship programs, credit hours up to 10 foreign language credit hours for transfer students in Florida, and credit hours earned in military science courses that are part of the Reserve Officers' Training Corps (ROTC) program).

Source: State University Database System (SUDS).

**Number of Faculty Awards**

This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards. Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).

**National Ranking for Institutional & Program Achievements**

This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.

Source: Board of Governors staff review.

**BOT Choice Metrics****Percent of R&D Expenditures Funded from External Sources**  
FAMU

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.

Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

**Bachelor's Degrees Awarded to Minorities**  
FAU, FGCU, FIU

This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code.

Source: State University Database System (SUDS).

**National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News**  
FSU

This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count.

Source: US News and World Report's annual National University rankings.





<b>Percent of Undergraduate Seniors Participating in a Research Course</b> NCF	This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year. Source: New College of Florida.
<b>Number of Bachelor Degrees Awarded Annually</b> UCF	This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once. Source: State University Database System (SUDS).
<b>Total Research Expenditures</b> UF	This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
<b>Percent of Course Sections Offered via Distance and Blended Learning</b> UNF	This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both. Source: State University Database System (SUDS).
<b>Number of Postdoctoral Appointees</b> USF	This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar. Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Percentage of Adult Undergraduates Enrolled</b> UWF	This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified. Source: State University Database System (SUDS).
<b>Preeminent Research University Funding Metrics</b>	
<b>Average GPA and SAT Score</b>	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Public University National Ranking</b>	A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.
<b>Freshman Retention Rate (Full-time, FTIC)</b>	Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.





<b>6-year Graduation Rate</b> (Full-time, FTIC)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1%-2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.
<b>National Academy Memberships</b>	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
<b>Total Annual Research Expenditures (\$M)</b> (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of \$200 million or more, as reported annually by the National Science Foundation (NSF).
<b>Total Annual Research Expenditures in Diversified Non-Medical Sciences (\$M)</b> (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount.
<b>National Ranking in S.T.E.M. Research Expenditures</b>	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
<b>Patents Awarded</b> (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/20100101->20131231 AND APT/1)".
<b>Doctoral Degrees Awarded Annually</b>	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report. Note: per legislative workpapers, this metric does not include Professional degrees.
<b>Number of Post-Doctoral Appointees</b>	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
<b>Endowment Size (\$M)</b>	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.



### Goals Common to All Universities

#### Academic Quality

<b>Avg. SAT Score</b> (for 3 subtests)	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').
<b>Avg. HS GPA</b>	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
<b>Professional/Licensure Exam First-time Pass Rates</b>	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.

#### Operational Efficiency

<b>Freshman Retention Rate</b>	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see <a href="#">link</a> .
<b>FTIC Graduation Rates</b> In 4 years (or less) In 6 years (or less)	As reported in the 2012-13 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>AA Transfer Graduation Rates</b> In 2 years (or less) In 4 years (or less)	As reported in the 2012-13 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
<b>Average Time to Degree (for FTIC)</b>	This metric is the number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.

#### Return on Investment

<b>Bachelor's Degrees Awarded</b>	This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).
<b>Percent of Bachelor's Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 4H).
<b>Graduate Degrees Awarded</b>	This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).
<b>Percent of Graduate Degrees in STEM</b>	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).
<b>Annual Gifts Received (\$M)</b>	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at <a href="http://www.cae.org/vse">www.cae.org/vse</a> .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
<b>Endowment (\$M)</b>	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).



## Goals Specific to Research Universities

### Academic Quality

#### Faculty Awards

Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see [link](#).

#### National Academy Members

The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see [link](#).

#### Number of Post-Doctoral appointees

As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see [link](#).

#### Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures

The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at [link](#)), but now data must be queried via WebCASPAR – see [link](#).

### Return on Investment

#### Total Research Expenditures (\$M)

Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Science & Engineering Research Expenditures in non-medical/health sciences

This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see [link](#), table 36 *minus* table 52), but now data must be queried via WebCASPAR.

#### Percent of R&D Expenditures funded from External Sources

This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources.  
Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).

#### Patents Issued

The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).

#### Licenses/Options Executed

Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).

#### Licensing Income Received (\$M)

License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2012-13 Accountability Report (table 6A).

#### Number of Start-up Companies

The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the 2012-13 Accountability Report (table 6A).

#### National rank is higher than predicted by Financial Resources Ranking

*based on US News & World Report*

This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.



<b>Research Doctoral Degrees Awarded</b>	The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).
<b>Professional Doctoral Degrees Awarded</b>	The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

### Student Debt Summary

#### Percent of Bachelor's Recipients with Debt

This is the percentage of bachelor's graduates in a given academic year who entered the university as a first-time-in-college (FTIC) student and who borrowed through any loan programs (institutional, state, Federal Perkins, Federal Stafford Subsidized and unsubsidized, private) that were certified by your institution - excludes parent loans.  
Source: Common Dataset (H4).

#### Average Amount of Debt for Bachelor's who have graduated with debt

This is the average amount of cumulative principal borrowed (from any loan program certified by the institution) for each native, FTIC bachelor's recipient in a given academic year that graduated with debt – see metric definition above. This average does NOT include students who did not enter a loan program that was certified by the institution.  
Source: Common Dataset (H5).

#### Student Loan Cohort Default Rate (3rd Year)

Student loan cohort default rate (CDR) data includes undergraduate and graduate students, and refers to the three federal fiscal year period when the borrower enters repayment and ends on the second fiscal year following the fiscal year in which the borrower entered repayment. Cohort default rates are based on the number of borrowers who enter repayment, not the number and type of loans that enter repayment. A borrower with multiple loans from the same school whose loans enter repayment during the same cohort fiscal year will be included in the formula only once for that cohort fiscal year. Default rate debt includes: Federal Stafford Loans, and Direct Stafford/Ford Loans – for more information see:  
<http://ifap.ed.gov/DefaultManagement/CDRGuideMaster.html>.

Three Year CDR			
Cohort Fiscal Year	Year Published	Borrowers in the Numerator Borrowers in the Denominator	3-Yr Time Period (Numerator) 1-Yr Time Period (Denominator)
2009	2012	Borrowers who entered repayment in 2009 and defaulted in 2009, 2010 or 2011 Borrowers who entered repayment in 2009	10/01/2008 to 9/30/2011 10/01/2008 to 9/30/2009
2010	2013	Borrowers who entered repayment in 2010 and defaulted in 2010, 2011 or 2012 Borrowers who entered repayment in 2010	10/01/2009 to 9/30/2012 10/01/2009 to 9/30/2010
2011	2014*	Borrowers who entered repayment in 2011 and defaulted in 2011, 2012 or 2013 Borrowers who entered repayment in 2011	10/01/2010 to 9/30/2013 10/01/2010 to 9/30/2011
2012	2015	Borrowers who entered repayment in 2012 and defaulted in 2012, 2013 or 2014 Borrowers who entered repayment in 2012	10/01/2011 to 9/30/2014 10/01/2011 to 9/30/2012
2013	2016	Borrowers who entered repayment in 2013 and defaulted in 2013, 2014 or 2015 Borrowers who entered repayment in 2013	10/01/2012 to 9/30/2015 10/01/2012 to 9/30/2013
2014	2017	Borrowers who entered repayment in 2014 and defaulted in 2014, 2015 or 2016 Borrowers who entered repayment in 2014	10/01/2013 to 9/30/2016 10/01/2013 to 9/30/2014
2015	2018	Borrowers who entered repayment in 2015 and defaulted in 2015, 2016 or 2017 Borrowers who entered repayment in 2015	10/01/2014 to 9/30/2017 10/01/2014 to 9/30/2015





## FISCAL INFORMATION (continued)

## Undergraduate Resident Tuition Summary (for 30 credit hours)

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition	\$3,100	\$3,152	\$3,152	\$3,152	\$3,152
Tuition Differential Fee	\$1,325	\$1,325	\$1,325		
Percent Increase	9%	1.2%	0%	0%	0%
Required Fees <sup>1</sup>	\$1,718	\$1,786	\$1,836	\$1,897	\$1,961
<b>TOTAL TUITION AND FEES</b>	<b>\$6,143</b>	<b>\$6,263</b>	<b>\$6,313</b>		

Note<sup>1</sup>: For more information regarding required fees see list of per credit hour fees and block fees on page 16.

## Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	37%	38%	41%	43%	45%
Average Amount of Debt for Bachelor's who have graduated with debt	\$16,600	\$17,504	\$19,636	\$20,708	\$24,018
NSLDS Cohort Year	2008	2009	2010	2011	2012 GOAL
Student Loan Cohort Default Rate (3rd Year)	2.43%	3.0%	3.8%	3.7%	4.0%

## Cost of Attendance (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$6,263	\$1,080	\$9,520	\$1,110	\$2,240	\$20,213
AT HOME	\$6,263	\$1,080	\$1,090	\$1,110	\$2,240	\$11,783

## Estimated Net Cost by Family Income (for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	7,904	28.33%	\$10,204	(\$3,705)	\$9,975	\$2,833
\$40,000-\$59,999	2,604	9.33%	\$13,578	(\$159)	\$6,429	\$3,077
\$60,000-\$79,999	2,347	8.41%	\$15,660	\$2,300	\$3,970	\$3,360
\$80,000-\$99,999	2,088	7.48%	\$16,229	\$3,010	\$3,260	\$3,186
\$100,000 Above	9,957	35.69%	\$16,330	\$3,312	\$2,958	\$1,824
Missing*	2,996	10.74%	n/a	\$3,624	\$2,646	\$82
<b>TOTAL</b>	<b>27,896</b>	<b>100%</b>	<b>AVERAGE</b>	<b>\$14,400*</b>	<b>\$1,397</b>	<b>\$4,873</b>
					<b>\$4,873</b>	<b>\$2,394</b>

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) minus the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) minus the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents (note\*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.



## FISCAL INFORMATION

## University Revenues (in Millions of Dollars)

	2013-14 Actual	2014-15 Appropriations*
<b>Education &amp; General – Main Operations</b>		
State Funds	\$342.5	\$371.1
Tuition	\$288.4	\$289.4
<b>TOTAL MAIN OPERATIONS</b>	<b>\$630.9</b>	<b>\$660.5</b>
<b>Education &amp; General – Health-Science Center / Medical Schools</b>		
State Funds	\$109.0	\$110.70
Tuition	\$ 38.5	\$38.4
<b>TOTAL HSC</b>	<b>\$147.5</b>	<b>\$149.1</b>
<b>Education &amp; General – Institute of Food &amp; Agricultural Sciences (IFAS)</b>		
State Funds	\$144.6	\$153.00
Tuition	\$ -	\$ -
<b>TOTAL IFAS</b>	<b>\$144.6</b>	<b>\$153.0</b>
<b>EDUCATION &amp; GENERAL TOTAL REVENUES</b>	<b>\$923.0</b>	<b>\$962.6</b>

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year, so are estimated.

\*The 2014-15 appropriations data includes the funds associated with the Performance Based Funding model, which is contingent upon approval by the Board of Governors at their June Board meeting.

## OTHER BUDGET ENTITIES

**Auxiliary Enterprises**

Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.

Revenues	\$325.2	n/a
----------	---------	-----

**Contracts & Grants**

Resources received from federal, state or private sources for the purposes of conducting research and public service activities.

Revenues	\$998.9	n/a
----------	---------	-----

**Local Funds**

Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.

Revenues	\$515.9	n/a
----------	---------	-----

**Faculty Practice Plans**

Revenues/receipts are funds generated from faculty practice plan activities.

Revenues	\$678.5	n/a
----------	---------	-----

**OTHER BUDGET ENTITY TOTAL REVENUES**

**\$2,518.5** n/a

**UNIVERSITY REVENUES GRAND TOTAL**

**\$3,441.5** n/a



## FISCAL INFORMATION (continued)

### TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

Effective Date	
University Board of Trustees approval date:	n/a
Campus or Center Location	
Campus or center location to which the tuition differential fee increase will apply (If the entire university, indicate as such):	n/a
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, provide rationale for the differentiation among courses):	
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$44.17
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0%
\$ Increase in tuition differential per credit hour:	\$0
\$ Increase in tuition differential for 30 credit hours:	\$0
Projected Differential Revenue Generated	
Incremental revenue generated in 2014-15 (projected):	\$0
Total differential fee revenue generated in 2014-15 (projected):	\$28,448,033
Intended Uses	
n/a	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
n/a	
Request to Modify or Waive Tuition Differential Uses	
<p>(pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)</p> <p>UF requests a waiver of the 70%/30% intended uses criteria identified in Regulation 7.001(14). UF will meet the financial needs of resident undergraduates who apply by the financial aid deadline. UF is currently utilizing a portion of the Differential Tuition (\$6.6M) and has increased its need-based financial aid from private source since 2011-12 to more than meet the 30% statutory requirement.</p>	