



AGENDA
Budget and Finance Committee
University Conference Center
University of West Florida
Pensacola, Florida
September 18, 2014
9:45 a.m. – 10:30 a.m.

or
Upon Adjournment of Previous Meetings

Chair: Mr. Tom Kuntz; Vice Chair: Mr. Ned Lautenbach
Members: Cavallaro, Colson, Hosseini, Huizenga, Levine, Tripp

1. **Call to Order and Opening Remarks** **Governor Tom Kuntz**
2. **Approval of Committee Meeting Minutes** **Governor Kuntz**
Minutes, June 18, 2014
3. **Public Notice of Intent to Amend Board of Governors Regulations** **Mr. Tim Jones,**
Vice Chancellor, Finance & Administration,
Board of Governors
 - a. **Regulation 7.001** Tuition and Associated Fees
 - b. **Regulation 7.008** Waiver and Exemptions of Tuition and Fees
4. **2014-2015 Operating Budgets** **Mr. Jones**
 - a. **State University System**
 - b. **Board General Office**

5. 2015-2016 Legislative Budget Requests

Mr. Jones

- a. [State University System](#)
- b. [Board General Office](#)

6. Concluding Remarks and Adjournment

Governor Kuntz

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: Approval of Minutes of Meeting held June 18, 2014

PROPOSED COMMITTEE ACTION

Approve the minutes from the meeting held on June 18, 2014.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution

BACKGROUND INFORMATION

Committee members will review and approve the minutes of the meeting held on June 18, 2014 at the University of Central Florida.

Supporting Documentation Included: Minutes: June 18, 2014

Facilitators/Presenters: Governor Kuntz

MINUTES
STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
BUDGET AND FINANCE COMMITTEE
UNIVERSITY OF CENTRAL FLORIDA
ORLANDO, FLORIDA
JUNE 18, 2014

*Video or audio archives of the meetings of the Board of Governors
and its Committees are accessible at <http://www.flbog.edu/>.*

Mr. Tom Kuntz, Chair, convened the meeting of the Budget and Finance Committee at 3:29 p.m. Members present for roll call were Ned Lautenbach; Carlo Fassi; Wayne Huizenga, Jr.; Alan Levine; Norman Tripp; Mori Hosseini and Dean Colson. Other Board members present included Dick Beard, Matthew Carter, Manoj Chopra, Ed Morton, Pam Stewart, and Daniel Doyle, Jr.

1. Call to Order

Mr. Kuntz called the meeting to order.

Mr. Kuntz noted that there were no university requests for new fees or increases to existing fees on the agenda this year. With the additional state support provided this year, along with the continued focus on lowering student debt and keeping tuition and fees affordable for Florida's families, it is nice not to have to consider fee increases. Mr. Kuntz thanked the boards of trustees for their due diligence in helping to keep Florida's tuition one of the lowest in the country.

2. Approval of March 19, 2014, Meeting Minutes

Mr. Colson moved that the Committee approve the minutes of the meeting held March 19, 2014 as presented. Mr. Tripp seconded the motion, and members of the Committee concurred.

3. Allocation of Performance Funds

Mr. Kuntz provided a recap of what the Committee and the Board have accomplished with the implementation of performance funds.

In 2012, this Committee was challenged by our former chair, Dean Colson, to develop a performance funding model. The Committee began discussions in the fall of 2012 and had this topic on every Committee agenda since the November 2012 meeting. At each meeting the Committee discussed issues surrounding the model and reviewed materials on other state performance models. In January, 2014 the Committee approved a final performance funding model.

Mr. Kuntz briefly recapped the Board's approved model which includes:

- 10 metrics, of which 2 are flexible metrics. One picked by the Board and one by the boards of trustees.
- It measures 'Excellence' or 'Improvement.'
- Each metric is worth up to 5 points, for a total of 50 points.
- A university must have at least 26 points to be eligible for new funds.
- A university with 25 points or less would lose 1 percent of their base funds.

The Board presented the model to the Legislature and Governor along with a request for \$50 million in new funds and a reallocation of \$50 million in base funds, for a total of \$100 million. This Board, along with the Chancellor and staff, worked very hard to educate Legislative members, their staffs and the Governor's office on the basic tenets of the model.

The performance funding model work that this Committee and Board did led to the Legislature and Governor providing the system with \$100 million in new funds, along with \$100 million in other base funds, for a total of \$200 million. We could not have done this without the leadership of the Speaker of the House and his appropriations chairs, the Senate President and his appropriations chairs and the Governor. This is a historic moment for our system and a signal to Floridians and taxpayers that we are serious about accountability and ensuring our students are able to stay in school, graduate and get a job. It is also a signal to our universities that we won't accept mediocrity and they will be held accountable for the funding they receive.

The Legislature did make a slight adjustment to our model. Under the legislative change, a university could lose up to 3.7 percent of its base funds. However, if they submit an improvement plan and successfully implement that plan over the next fiscal year, then they could potentially have all of their base funding restored. This is the only change made to the plan that was submitted by the Board.

Mr. Kuntz reminded the Committee about the improvement plans presented by UWF, FAU and UWF. Mr. Kuntz indicated there is a document that provides a timeline of events regarding the monitoring of the improvement plans in the agenda material.

Mr. Kuntz then requested Mr. Tim Jones to explain the allocation of the \$200 million in performance funds.

Mr. Jones reviewed a PowerPoint slide that outlined the source of the funds included in the \$200 million. He indicated that eight universities will begin receiving performance funds in July, assuming approval by the Board, while funds for NCF, FAU and UWF will be held in reserve pending release by the Board in January 2015 and June 2015.

After discussion, Mr. Colson moved that the Committee approve the distribution of the \$200 million as presented. Mr. Tripp seconded the motion, and members of the Committee concurred.

4. Market Tuition Pilot Extension

Mr. Kuntz asked Mr. Jones to explain the next agenda item.

Mr. Jones reviewed the history of the program, the development of the regulation, and the original requirement of a three year pilot program. He mentioned that 65 programs have been approved with 14 of those being implemented this past school year. The other programs implemented only have data for one or two years, so sufficient data isn't available to make a complete recommendation on the success of the program. Staff is recommending that the pilot period be extended for two additional years to allow for more data to be available to make a determination about the future direction of the program. If the Committee concurs, staff would update the regulation and bring that to the Committee at the September meeting for review and approval.

Mr. Kuntz wanted to confirm that staff would like approval from the Committee to modify the regulation to extend the pilot period for two additional years and the amended regulation would come to the Committee in September for consideration.

Mr. Jones replied in the affirmative.

Mr. Huizenga requested that staff provide the data criteria that will be reviewed in determining the success of the program. Mr. Cavallaro requested that staff provide the tuition rates prior to implementing market tuition and the current market tuition rates.

Mr. Jones indicated he would provide this information.

5. 2015-2016 Legislative Budget Request Guidelines

Mr. Jones apprised the Committee of the 2015-2016 LBR guidelines and identified the four changes that were noted in the agenda item.

Mr. Tripp moved that the Committee approve the 2015-2016 LBR guidelines as presented. Mr. Colson seconded the motion, and members of the Committee concurred.

6. Concluding Remarks and Adjournment

Having no further business, the meeting was adjourned at 3:41 p.m.

Tom Kuntz, Chair

Tim Jones, Vice Chancellor
Finance and Administration

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: Public Notice of Intent to Amend Board of Governors Regulation 7.001
Tuition and Associated Fees

PROPOSED COMMITTEE ACTION

Approve the public notice of intent to amend Board of Governors Regulation 7.001
Tuition and Associated Fees.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

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

BACKGROUND INFORMATION

This regulation is being amended to clarify the following:

- Eliminates the specific amount charged for undergraduate tuition and references the law.
- Eliminates the reference to the building fee as it was combined with the capital improvement fee during the 2013 session.
- Eliminates the additional charge associated with a college preparatory course. This change is made pursuant to the modification made in the 2013 session pursuant to SB 1720.
- Eliminates the date when a block tuition proposal is to be submitted to the Board. Dates will be established pursuant to the Board's data request system.
- Modifies the tuition differential language pursuant to HB 851 passed in 2014.
- Modifies the date the tuition differential report is due to the legislature from January 1 to February 1. The date was modified in SB 1514 during the 2013 session.
- Extends the date of the pilot period for market tuition programs to November 2016.

- Clarifies the appeal period for tuition differential and market tuition to be calendar days.

These changes have been shared with the universities and comments have been received. Where possible, modifications were made to address university suggestions.

If approved, the amended regulation will be noticed on the Board's website for 30 days with final approval by the Board at the November 6, 2014 meeting.

Supporting Documentation Included: Amended Regulation 7.001

Facilitators/Presenters: Tim Jones

7.001 Tuition and Associated Fees

(1) All students shall pay tuition and associated fees, unless waived pursuant to Regulation 7.008, as authorized by the Board of Governors or its designee.

(2) Tuition shall be defined as the basic fee assessed to students for enrollment in credit courses at any of the state universities. Non-resident tuition shall be defined as the basic fee and out-of-state fee assessed to non-resident students for enrollment in credit courses at any of the state universities. The out-of-state fee is the additional fee charged to a non-resident student. The non-resident tuition must be sufficient to offset the full instructional cost of serving the non-resident student. Calculations of the full cost of instruction shall be based on the university average of the prior year's cost of programs using the expenditure analysis.

(3) ~~Effective with the Fall 2011 term, undergraduate tuition shall be \$103.32 per credit hour~~ Undergraduate tuition per credit hour shall be established pursuant to law.

(4) Each university board of trustees may set tuition for graduate, including professional, programs pursuant to law.

(5) Each university board of trustees may set out-of-state fees for undergraduate and graduate ~~and, including~~ professional, programs pursuant to law.

(6) Associated fees shall include the following fees ~~and other fees as authorized by the Board of Governors:~~

(a) Student Financial Aid Fee;

(b) Capital Improvement Fee;

~~(c) Building Fee;~~

~~(c)~~ Health Fee;

~~(d)~~ Athletic Fee;

~~(e)~~ Activity and Service Fee;

~~(f)~~ Non-Resident Student Financial Aid Fee, if applicable;

~~(g)~~ Technology Fee;

(h) other fees approved by the Board of Governors pursuant to Regulation 7.003(24); and

~~(i) Tuition Differential Fee.~~

(7) Students shall pay tuition and associated fees or make other appropriate arrangements for the payment of tuition and associated fees (installment payment, deferment, or third party billing) by the deadline established by the

university for the courses in which the student is enrolled, which shall be no later than the end of the second week of class.

(8) Registration shall be defined as the formal selection of one or more credit courses approved and scheduled by the university and tuition payment, partial or otherwise, or other appropriate arrangements for tuition payment (installment payment, deferment, or third party billing) for the courses in which the student is enrolled as of the end of the drop/add period.

(9) Tuition and associated fees liability shall be defined as the liability for the payment of tuition and associated fees incurred at the point at which the student has completed registration, as defined above.

(10) Tuition and associated fees shall be levied and collected for each student registered in a credit course, unless provided otherwise in Board regulations.

(11) Each student enrolled in the same undergraduate college-credit course more than twice shall pay tuition at 100 percent of the full cost of instruction and shall not be included in calculations of full-time equivalent enrollments for state funding purposes. Students who withdraw or fail a class due to extenuating circumstances may be granted an exception only once for each class pursuant to established university regulations. The university may review and reduce these fees paid by students due to continued enrollment in a college-credit class on an individual basis contingent upon the student's financial hardship. For purposes of this paragraph, first-time enrollment in a class shall mean enrollment in a class fall semester 1997 or thereafter. Calculations of the full cost of instruction shall be based on the system-wide average of the prior year's cost of undergraduate programs in the state university system using the expenditure analysis.

~~(12) Each FAMU student enrolled in the same college preparatory class more than twice shall pay 100 percent of the full cost of instruction to support continuous enrollment of that student in the same class, and shall not be included in calculations of full-time equivalent enrollments for state funding purposes. Students who withdraw or fail a class due to extenuating circumstances may be granted an exception only once for each class pursuant to established university regulations. Calculations of the full cost of instruction shall be based on FAMU's average of the prior year's cost of remedial undergraduate programs using the expenditure analysis and adjusted by the percentage budget increase in the current year appropriation.~~

(13) A university board of trustees may submit a proposal for a block tuition policy to the budget committee for consideration ~~by the committee during a November meeting~~. The proposed block tuition policy for resident

undergraduate or graduate students shall be based on the per-credit hour tuition amount. The proposed block tuition policy for nonresident undergraduate or graduate students shall be based on the per-credit-hour tuition and out-of-state fee amount. The block tuition policy can only be implemented beginning with the fall term.

(a) The proposal shall be submitted in a format designated by the Chancellor and include at a minimum:

1. An explanation of the process used to determine the block tuition ranges.
2. An explanation of how the university will ensure that sufficient courses are available to meet student demand.
3. A description of how the policy is aligned with the mission of the university.
4. A declaratory statement that the policy does not increase the state's fiscal liability or obligation.
5. An explanation of any proposed restrictions, limitations, or conditions to be placed on the policy.
6. A clear statement that any student that is a beneficiary of a prepaid tuition contract, purchased prior to the first fall term in which the block tuition is implemented, will not be included in any block tuition policy and will be billed on a per-credit-hour basis. The university shall work with the Florida Prepaid Board to determine how block tuition will be paid for beneficiaries of prepaid tuition contracts after implementation of block tuition. The university shall report the final resolution to the budget committee.
7. An estimation of the economic impact that implementation of the policy will have on the university and the student by identifying the incremental revenue the university anticipates collecting if this policy is implemented and the financial impact on the typical student subject to the policy.
8. A description of any outcome measures that will be used to determine the success of the policy, including but not limited to, time to degree, course load impact, and graduation rates.

(b) The Board of Governors will act upon the budget committee recommendation at the next scheduled meeting. If a university board of trustees' proposal is denied, within five calendar days, the university board of trustees may request reconsideration by the Board's Tuition Appeals Committee, which shall consist of the Chair of the Board and the Chair of each Board committee. The Tuition Appeals Committee will meet within ten days after the Board of Governors' denial to consider a university board of trustees request for reconsideration.

(c) Every five years, the university board of trustees shall review the policy to determine if it has met its intended outcomes and whether the policy should be continued or modified. The university board of trustees shall submit its findings to the Board.

(14) As a component of the annual university ~~w~~Work pPlan, a board of trustees of a university that has been designated as a preeminent state research university may submit a proposal to the budget committee of the Board of Governors by May 31 of each year to establish an increase in the undergraduate tuition differential to be implemented with the fall academic term. The tuition differential shall promote improvements to undergraduate education and provide financial aid to undergraduate students who have financial need. University boards of trustees shall have flexibility in distributing need-based financial aid awards according to university policies and Board of Governors' regulations.

~~(a)~~-(a) The aggregate sum of tuition and tuition differential can not be increased by more than ~~6~~15 percent of the total charged for the aggregate sum of these fees in the preceding fiscal year. The tuition differential may be increased if the university meets or exceeds performance standard targets for that university established annually by the Board of Governors for the following performance standards, amounting to no more than a two percent increase for each performance standard: an increase in the 6-year graduation rate for full-time, first-time-in-college students, as reported annually to the Integrated Postsecondary Education Data System; an increase in the total annual research expenditures; and an increase in the total patents awarded by the U.S. Patent and Trademark Office for the most recent three year period.

1. The tuition differential may be assessed on one or more undergraduate courses or all undergraduate courses and may vary by campus or center location.
2. The sum of undergraduate tuition and associated fees per credit hour may not exceed the national average undergraduate tuition and fees at four-year degree granting public postsecondary educational institutions.
3. Students having prepaid contracts in effect on July 1, 2007, and which remain in effect, are exempt from paying the tuition differential.
4. Students who were in attendance at the university before July 1, 2007, and maintain continuous enrollment may not be charged the tuition differential.

(b) The university board of trustees' proposal shall be submitted in a format designated by the Chancellor, and include at a minimum:

1. The course or courses for which the tuition differential will be assessed.

2. The amount that will be assessed for each tuition differential proposed.
3. The purpose of the tuition differential.
4. Identification of how the revenues from the tuition differential will be used to promote improvements in the quality of undergraduate education and to provide financial aid to undergraduate students who have financial need.
 - a. For the purposes of the following subsection,
 - i. "Financial aid fee revenue" means financial aid fee funds collected in the prior year.
 - ii. "Private sources" means prior-year revenue from sources other than the financial aid fee or the direct appropriation for financial assistance provided to state universities in the General Appropriations Act.
 - b. At least thirty percent of the revenue shall be expended to provide need-based financial aid to undergraduate students to meet the cost of university attendance. If the entire tuition and fee costs of resident students who have applied for and received Pell Grant funds have been met and the university has excess funds remaining, the university may expend the excess portion on undergraduate education.
 - i. Universities shall increase undergraduate need-based aid over the prior year by at least thirty percent of the tuition differential.
 - ii. This expenditure shall not supplant the amount of need-based aid provided to undergraduate students in the preceding fiscal year from financial aid fee revenues, the direct appropriation for financial assistance provided to state universities in the general appropriations act, or from private sources.
 - iii. If a university's total undergraduate need-based awards does not meet or exceed the sum of the prior year's undergraduate need-based awards plus thirty percent of new tuition differential funds, the university may still be considered in compliance. However, the university shall provide detailed documentation demonstrating that the difference is attributed to a decrease in financial aid fee collections (Regulation 7.003(18)), tuition differential collections, the direct appropriation for student financial assistance in the General Appropriations Act, and/or a decrease in foundation endowments that support undergraduate need-based aid awards.
 - c. The remaining revenue shall be expended on undergraduate education.

~~5. Indicate how the university will monitor the success of the tuition differential in achieving the purpose for which the tuition differential is being assessed.~~

~~(c) The budget committee will examine data gathered as part of the University Annual Reports instituted pursuant to Regulation 2.002 to inform members' deliberations regarding institutional proposals for tuition differential increases. At a minimum, the committee will review:~~

- ~~1. Undergraduate retention and graduation rates.~~
- ~~2. Percentage of students graduating with more than 110 percent of the hours required for graduation.~~
- ~~3. Licensure pass rates for completers of appropriate undergraduate programs.~~
- ~~4. Number of undergraduate course offerings.~~
- ~~5. Percentage of undergraduate students who are taught by each instructor type.~~
- ~~6. Average salaries of faculty who teach undergraduate courses.~~
- ~~7. Undergraduate student faculty ratio.~~
- ~~8. Other university specific measures identified by the boards of trustees pursuant to subparagraph (14)(b)5.~~
- ~~9. Number of need based financial aid awards provided, average award, and median award.~~

~~(cd) The budget committee shall review each proposal and advise the university board of trustees of the need for any additional information or revision to the proposal. The budget committee will make a recommendation to the Board of Governors at the next scheduled meeting.~~

~~(de) The Board of Governors will act upon the budget committee recommendation at the next scheduled meeting. If a university board of trustees' proposal is denied, within five calendar days the university board of trustees may request reconsideration by the Board's Tuition Appeals Committee, which shall consist of the Chair of the Board and the Chair of each Board committee. The Tuition Appeals Committee will meet within ten calendar days after the Board of Governors' denial to consider a university board of trustees request for reconsideration.~~

~~(ef) Each university board of trustees that has been approved to assess a tuition differential shall submit the following information to the Board of Governors General Office in a format and at a time designated by the Chancellor, so that such information can be incorporated into a system report that will be submitted annually to the Governor and Legislature by February~~January~~ 1.~~

1. The amount of tuition differential assessed.
2. The course or courses for which the tuition differential was assessed.
3. Total revenues generated.
4. Number of students eligible for a waiver as outlined in Regulation 7.008(20), number of these students receiving a waiver, and the value of these waivers.
5. Detailed expenditures (submitted as a part of the August operating budget).
6. Detailed reporting of financial aid sources and disbursements sufficient to meet the requirements in subparagraph (14)(b)4.
- ~~7. Data on indicators outlined in subparagraph (14)(c).~~

(~~fg~~) Universities must maintain the need-based financial aid revenue generated from the tuition differential in a separate Education and General account, with the revenue budget in the Student and Other Fee Trust Fund.

(~~gh~~) If, after approval by the Board of Governors, a university determines that modifications need to be made to the monitoring and implementation of the proposed undergraduate improvement programs, the university shall notify the Chancellor.

(15) A university board of trustees may submit a proposal for market tuition rates for graduate-level courses offered online or through the university's continuing education unit when such courses constitute an approved degree program or college credit certificate program. Proposals shall be submitted to the budget committee for consideration by the committee during a November meeting.

(a) Proposals to charge market tuition rates for degree programs and college credit certificate programs shall be considered by the Board only if documentation is provided that demonstrates:

1. The programs have been approved in accordance with Regulation 8.011 and have established one or more separate market tuition rate student cohorts, each of which can be tracked for administrative and reporting purposes.
2. The programs do not lead to initial licensing or certification for occupational areas identified as state critical workforce need in the State University System of Florida Strategic Plan, 2005-2013, Areas of Programmatic Strategic Emphasis, as amended in 2009. A university may request establishment of market tuition rates for such programs for non-residents if such programs do not adversely impact development of other programs for Florida residents. A university, upon a written request for a special exception from the Chancellor,

may submit a proposal for market tuition rate for a program leading to initial licensing or certification in a state critical workforce need area if it can be demonstrated to increase the number of graduates in the state.

3. The program admission and graduation requirements shall be the same as similar programs funded by state appropriations.

(b) If approved by the Board, the university shall operate these programs for a pilot period in order to collect sufficient information to determine the merit and success of market tuition rate courses. During the pilot period, the Board shall approve no more than five new graduate-level degree programs or college credit certificate program proposals per academic year. During November, 2016~~After three years~~, the university shall present its findings to the Board budget committee. The university findings shall include, but not be limited to, program enrollments, degrees produced, and enrollments in similar state funded programs. The budget committee will then make any appropriate recommendations to the Board for changes of market tuition rates programs.

(c) The proposal for market tuition rate programs shall be submitted in a format designated by the Chancellor and include at a minimum:

1. A description of the program and its compliance with the requirements outlined in (15)(a).
2. An explanation of the process used to determine the market tuition rate and the tuition at similar programs from at least five other institutions, including both private and public.
3. A description of similar programs offered by other state university system institutions.
4. An estimate of the market tuition rate to be charged over the next three years. Any annual increase shall be no more than 15 percent over the preceding year.
5. A description of how offering the proposed program at market tuition rate is aligned with the mission of the university.
6. An explanation and declaratory statement that offering the proposed program at market tuition rate does not increase the state's fiscal liability or obligation.
7. An explanation of any differentiation in rate between resident and non-resident students paying market tuition rate.
8. An explanation of any proposed restrictions, limitations, or conditions to be placed on the program.
9. A description of any outcome measures that will be used to determine the success of the proposal.

10. In addition, the following information will be included with the proposal:

- a. An explanation of how the university will ensure that sufficient courses are available to meet student demand and facilitate completion of each program submitted for consideration.
- b. A baseline of current enrollments, including a breakout of resident and nonresident enrollment, in similar state-funded courses.
- c. An estimation of the economic impact that implementation of the proposal will have on the university and the student by identifying the incremental revenue the university anticipates collecting if the proposal is approved.
- d. A description of how revenues will be spent, including whether any private vendors will be utilized, and which budget entity the funds will be budgeted.

(d) The Board of Governors will act upon the budget committee recommendation at the next scheduled meeting. If a university board of trustees' proposal is denied, within five calendar days, the university board of trustees may request reconsideration by the Board's Tuition Appeals Committee, which shall consist of the Chair of the Board and the Chair of each Board committee. The Tuition Appeals Committee will meet within ten calendar days after the Board of Governors' denial to consider a university board of trustees request for reconsideration.

(e) If a university charges a market tuition rate for a course within an approved program, preference shall be given to Florida residents in the admission process for similar state funded programs.

(f) Enrollments and degrees granted in market tuition rate program cohorts shall be reported in a manner to be determined by the Chancellor.

(g) Credit hours generated by courses in market tuition rate program cohorts shall not be reported as fundable credit hours and all costs shall be recouped within the market tuition rate.

(h) Programs and associated courses approved for market tuition rate shall not supplant existing university offerings funded by state appropriations.

(i) Each university approved to offer market tuition rates shall provide an annual status report in a format designated by the Chancellor.

Authority: Section 7(d), Art. IX, Fla. Const.; History—Formerly BOR Rule 6C-7.001, Adopted 4-8-79, Renumbered 12-16-74, Amended 6-28-76, 7-4-78, 8-6-79, 9-28-81, 12-14-83, 7-25-84, 10-2-84, 10-7-85, Formerly 6C-7.01, Amended 12-25-86, 11-16-87, 10-19-88, 10-17-89, 10-15-90, 9-15-91, 1-8-92, 11-9-92, 7-22-93, 8-1-94, 11-29-94, 4-16-96, 8-12-96, 9-30-97, 12-15-97, 8-11-98, 9-30-98, 8-12-99, 8-3-00, 8-28-00, 8-12-01, Amended and Renumbered as 7.001 09-25-08, Amended 12-10-09, 11-04-10, 01-20-11, 9-15-11,_____.

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: Public Notice of Intent to Amend Board of Governors Regulation 7.008
Waiver and Exemptions of Tuition and Fees

PROPOSED COMMITTEE ACTION

Approve the public notice of intent to amend Board of Governors Regulation 7.008
Waiver of Exemptions of Tuition and Fees.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

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

BACKGROUND INFORMATION

This regulation is being amended to clarify the following:

- Requires the university to designate an individual to handle student issues regarding waivers. This language is provided due to the numerous phone inquiries the Board Office receives regarding waivers and there is not always a central point of contact at the universities to handle student inquiries.
- Rewords and clarifies language regarding Florida Linkage Institutes.
- Adds language for Veteran's waivers pursuant to HB 7015 passed in 2014.
- Adds language for nonresident waivers pursuant to HB 851 passed in 2014.
- Adds language for child protection and child welfare personnel waivers pursuant to SB 1666 passed in 2014.

These changes have been shared with the universities and comments have been received. Where possible, modifications were made to address university suggestions.

If approved, the amended regulation will be noticed on the Board's website for 30 days with final approval by the Board at the November 6, 2014 meeting.

Supporting Documentation Included: Amended Regulation 7.008

Facilitators/Presenters: Tim Jones

7.008 Waivers and Exemptions of Tuition and Fees

(1) Each university board of trustees is authorized to waive tuition, non-resident tuition and associated fees for purposes that support and enhance the mission of the university. All tuition, non-resident tuition and associated fees waived must be based on regulations that are adopted by the university board of trustees and where applicable, consistent with regulations adopted by the Board of Governors.

(2) Each university shall have an individual designated as the university liaison (such as the university ombudsman) to handle student issues and/or questions regarding waivers.

~~(32)~~ Sponsored Credit Institutes and Programs – Each university board of trustees is authorized to waive tuition, associated fees and material and supply fees for participants in sponsored credit institutes and programs.

- (a) Sponsored credit institutes and programs are entities where substantially all the direct costs are paid by the external sponsoring entity, where there is no direct expenditure of Educational and General funds for the conduct of the programs, and where no fees or other assessments are collected from students by the sponsoring entity, the university, or any other entity.
- (b) In determining whether the direct costs are paid by the sponsoring entity, funds paid directly to the participants in a form such as, but not limited to, stipends, travel or book allowances should not be taken into account. "Direct costs" refer to the costs associated with the instruction or training which a participant receives. All funds collected from sponsoring entities for sponsored credit institutes will be remitted to the university's contract and grants trust fund and/or auxiliary trust funds.
- (c) Funds collected from courses offered through continuing education should be budgeted in the Auxiliary Trust Fund.
- (d) Neither the number of participants nor student credit hours in these institutes and programs may be counted for state-funding purposes.

~~(43)~~ Deceased Law Enforcement, Correctional, or Correctional Probation Officers Employed by the State or Political Subdivision thereof – Each university board of trustees shall waive certain educational expenses that the child or spouse of the deceased officer incurs while obtaining an undergraduate education or a postgraduate education if a law enforcement, correctional, or correctional probation officer is accidentally killed or receives accidental bodily injury which results in the loss of the officer's life while engaged in the performance of the officer's law enforcement duties on or after June 22, 1990, or is unlawfully and intentionally killed or dies as a result of such unlawful and intentional act on or

after July 1, 1980, while the officer was employed by a political subdivision of the state.

- (a) The amount waived by the university shall be an amount equal to the cost of tuition and associated fees for a total of 120 credit hours. The child or spouse may attend on either a full-time or part-time basis. The benefits provided to a child under this section shall continue until the child's 25th birthday. The benefits provided to a spouse under this subsection must commence within 5 years after the death occurs, and entitlement thereto shall continue until the 10th anniversary of that death.
- (b) Upon failure of any child or spouse benefited by the provisions of this subsection to comply with the ordinary and minimum requirements of the institution attended, both as to discipline and scholarship, the benefits shall be withdrawn as to the child or spouse and no further moneys may be expended for the child's or spouse's benefits so long as such failure or delinquency continues.
- (c) Only a student in good standing in his or her respective university may receive the benefits.
- (d) A child or spouse receiving benefits under this subsection must be enrolled according to the customary rules and requirements of the university attended.

(54) Deceased Firefighters Employed by the State or a Political Subdivision thereof - Each university board of trustees shall waive certain educational expenses that the child or spouse of the deceased firefighter incurs while obtaining an undergraduate education or a postgraduate education if a firefighter is accidentally killed or receives accidental bodily injury which results in the loss of the firefighter's life while engaged in the performance of the firefighter's duties on or after June 22, 1990, or is unlawfully and intentionally killed or dies as a result of such unlawful and intentional act on or after July 1, 1980, while the firefighter was employed by a political subdivision of the state.

- (a) The amount waived by the university shall be an amount equal to the cost of tuition and associated fees for a total of 120 credit hours. The child or spouse may attend on either a full-time or part-time basis. The benefits provided to a child under this section shall continue until the child's 25th birthday. The benefits provided to a spouse under this subsection must commence within 5 years after the death occurs, and entitlement thereto shall continue until the 10th anniversary of that death.
- (b) Upon failure of any child or spouse benefited by the provisions of this subsection to comply with the ordinary and minimum requirements of the institution attended, both as to discipline and scholarship, the benefits shall be withdrawn as to the child or spouse and no further moneys may be expended for the child's or spouse's benefits so long as such failure or delinquency continues.

- (c) Only a student in good standing in his or her respective university may receive the benefits.
- (d) A child or spouse receiving benefits under this subsection must be enrolled according to the customary rules and requirements of the university attended.

(65) Acceleration – Each university board of trustees shall waive tuition and associated fees for students who earn credit in courses toward both a Florida high school diploma and an associate or baccalaureate degree, or students enrolled in a dual enrollment or early admission program.

(76) Florida Department of Children and Family Service Adoptions - Each university board of trustees shall waive tuition and associated fees for any student who is or was at the time he or she reached the age of 18 in the custody of the Department of Children and Family Services or a relative under s. 39.5085; who was adopted from the Department of Children and Family Services after May 5, 1997; or was placed in a guardianship by a court after spending at least 6 months in the custody of the Department after reaching 16 years of age. Additionally, material and supply fees and fees associated with enrollment in career-preparatory instruction shall be waived. Any student requesting such a waiver must provide certification of eligibility from the Department of Children and Family Services to the university in which the student seeks to enroll. This waiver shall remain valid up until the time the student reaches the age of 28, and shall be limited to undergraduate degree programs, and shall not exceed 120 credit hours.

(87) School Psychology Training Program – Each university board of trustees shall waive tuition and associated fees for internship credit hours applicable to an internship in the public school system under the supervision of the Florida Department of Education certified school psychologist employed by the school system for any graduate student.

-(98) Florida Linkage Institutes – Each university board of trustees shall exempt up to 25 full-time equivalent students per year from the payment of from out-of-state fees~~non-resident tuition and out-of-state~~non-resident financial aid fee for up to 25 full-time equivalent students per year enrolled through the Florida Linkage Institutes Program.

(109) Deceased Teacher or School Administrator Employed by a Florida District School Board – Each university board of trustees shall waive certain educational expenses that the child of the deceased teacher or school administrator incurs while obtaining an undergraduate education or a postgraduate education if the teacher or school administrator is killed or is injured and dies as a result of an

unlawful and intentional act, provided such killing or injury inflicted by another person and the motivation for the act is related in whole or part to the fact that the individual is a teacher or school administrator, or such act is inflicted while he or she is engaged in the performance of teaching duties or school administration duties while employed by a Florida district school board. The amount waived by the university shall be an amount equal to the cost of tuition and associated fees for a total of 120 credit hours at a university. The child may attend on either a full-time or part-time basis. The benefits provided under this paragraph shall continue until the child's 25th birthday.

- (a) Upon failure of any child benefited by the provisions of this paragraph to comply with the ordinary and minimum requirements of the university attended, both as to discipline and scholarship, the benefits shall be withdrawn as to the child and no further moneys may be expended for the child's benefits so long as such failure or delinquency continues.
- (b) A student who becomes eligible for benefits under the provisions of this paragraph while enrolled in an university must be in good standing with the institution to receive the benefits provided herein.
- (c) A child receiving benefits under this paragraph must be enrolled according to the customary rules and requirements of the university attended.

(11~~9~~) Homeless – Each university board of trustees shall waive tuition and associated fees for up to a total of 120 credit hours for an undergraduate degree program or for any undergraduate degree program that exceeds 120 hours approved pursuant to Regulation 8.014 for any student who lacks a fixed, regular, and adequate nighttime residence, excluding university housing, or whose primary nighttime residence is a public or private shelter designed to provide temporary residence for individuals intended to be institutionalized, or a public or private place not designed for, or ordinarily used as, a regular sleeping accommodation for human beings.

(12~~4~~) Purple Heart Recipients – Each university board of trustees shall waive undergraduate tuition and associated fees for each recipient of a Purple Heart, or another combat decoration superior in precedence which was awarded for valor, and who:

- (a) Is enrolled as a full-time, part-time, or summer-school student in an undergraduate program that terminates in a degree or certificate;
- (b) Is currently, and was at the time of the military action that resulted in the awarding of the Purple Heart or other combat decoration superior in precedence, a resident of this state; and
- (c) Submits to the state university the DD-214 form issued at the time of separation from service as documentation that the student has received

a Purple Heart or another combat decoration superior in precedence. In situations where admissions or financial aid application deadlines preclude providing a DD-214 in time to meet such a deadline, the official (service specific) transmitting correspondence that would normally accompany such an award to a previously discharged service member would suffice until an updated DD-214 could be obtained and presented to the postsecondary institution. However, the updated DD-214 must be submitted to the postsecondary institution by the start of the student's next term of enrollment for continued eligibility for the waiver. In situations where a service member is on active duty and has not been issued a DD-214, the official (service specific) transmitting correspondence that would normally accompany such an award or a certification of the appropriate combat award by the service specific administrative record holder [e.g., Adjutant, G-1 (general staff officer - personnel), or JAG (Judge Advocate General)] would meet the documentation requirement.

- (d) A waiver for a Purple Heart recipient or recipient of another combat decoration superior in precedence shall be applicable for 110 percent of the number of required credit hours of the degree or certificate program for which the student is enrolled. This waiver is considered "countable aid" for student financial aid purposes. Therefore, if this waiver is administered by an office other than the college financial aid office, college officials must notify the Director of Financial Aid that a student has qualified for the waiver. The waiver covers only tuition and fees associated with credit hour instruction provided directly by the university and does not include any additional fees that may be charged for specialized programs or by external organizations. This includes, but is not limited to, flight school, study abroad travel and living expenses, and courses taken elsewhere as a transient student.

(132) State Employees - Each university board of trustees shall waive tuition and associated fees for up to 6 credit hours per term on a space available basis for state employees.

(143) University Employees - Each university board of trustees may allow full-time university employees to enroll up to 6 credit hours of tuition-free courses per term on a space available basis.

(154) Florida residents 60 years of age or older - Each university board of trustees may waive any or all application, tuition, and associated fees for persons 60 years of age or older who are residents of this state and who enroll to audit courses being offered for college credit. No academic credit shall be awarded for attendance in classes for which fees are waived under this subsection. This

privilege may be granted only on a space-available basis, if such classes are not filled as of the close of registration. A university may limit or deny the privilege for courses which are in programs for which the Board of Governors has established selective admissions criteria. Persons paying full fees and state employees taking courses on a space-available basis shall have priority over those persons whose fees are waived in all cases where classroom spaces are limited.

(165) Intern Supervisors – Persons who supervise interns for institutions within the State University System may be given one non-transferable certificate (fee waiver) for each full academic term during which the person serves as an intern supervisor. This certificate shall provide for waiver of the basic fee (as defined in Regulation 7.001).

- (a) Certificate holders are entitled to a waiver of tuition for a maximum of six (6) hours credit instruction (including credit through continuing education) during a single term at any state university.
- (b) Certificates shall be valid for three years from date of issuance.
- (c) Eligible recipients of an Intern Participation Certificate may be identified by a university as a person who engages in the direct supervision of at least one university intern for 300 contact hours, which may be accumulated over multiple semesters provided at least 100 contact hours of direct supervision is provided per semester.
- (d) To be eligible for a Certificate, the internship program must be an essential part of the course of instruction and must be required as part of the degree.
- (e) Each university shall develop procedures and policies to govern the issuance, distribution, security, and redemption of certificates.
- (f) Each university shall maintain accurate data on Intern Participation Certificates and annually submit a report of certificate activity to the Board of Governors according to a prescribed format.

(176) Non-resident students – Non-resident students who are non-degree seeking may be entitled to a waiver of the out-of-state fee if the credit hours generated by such students are non-state fundable and the cost for the program of study is recovered from the fees charged to all students.

(187) Admissions Deposit – A university that establishes an admissions deposit must adopt policies that provide for the waiver of this deposit on the basis of financial hardship.

(198) Wrongfully Incarcerated – A university shall waive tuition and associated fees for up to 120 hours of instruction if the wrongfully incarcerated person meets and maintains the regular admission requirement of the university;

remains registered and makes satisfactory academic progress as defined by the university in which the person is enrolled. A wrongfully incarcerated person is someone who has had a felony conviction and sentence vacated by a court and the original sentencing court has issued its order finding that the person neither committed the act, nor did not aid, abet or act as an accomplice or accessory to the act or offense.

~~(2019)~~ A university may waive the tuition differential for students who meet the eligibility requirements for the Florida public assistance grant.

~~(210)~~ Public School Classroom Teacher – Each university board of trustees may waive tuition and fees for a classroom teacher who is employed full-time by a school district and who meets the academic requirements established by the university for up to six credit hours per term on a space-available basis in undergraduate courses related to special education, mathematics or science approved by the Department of Education. The waiver may not be used for courses scheduled during the school district's regular school day.

(22) Veterans – Each university board of trustees shall waive out-of-state fees for honorably discharged veterans of the United States Armed and Reserve Forces (Air Force, Army, Coast Guard, Marines, and Navy) and the National Guard (Army and Air) who physically reside in Florida while enrolled in the university. The waiver is applicable to 110 percent of the required credit hours of the degree or certificate program.

(23) Nonresident Waiver – Each university board of trustees shall waive out-of-state fees, including the out-of-state financial aid fee, for students, including, but not limited to, students who are undocumented for federal immigration purposes, who meet the following conditions:

(i) Attended a secondary school in this state for three consecutive years immediately before graduating from a high school in this state;

(ii) Apply for enrollment in an institution of higher education with 24 months after high school graduation; and

(iii) Submit an official Florida high school transcript as evidence of attendance and graduation.

The waiver is applicable for 110 percent of the required credit hours of the undergraduate degree or certificate program for which the student is enrolled.

A state university student granted an out-of-state fee waiver must be considered a nonresident student for purposes of calculating the system-wide total enrollment of nonresident students as limited in Regulation 7.006.

A student who is granted an out-of-state fee waiver is not eligible for state financial aid.

Each university shall, within the nonresident student enrollment system-wide, prioritize the enrollment of a veteran who is granted an out-of-state fee waiver pursuant to paragraph 22 over a student who is granted an out-of-state fee waiver under this paragraph.

(24) Child Protection and Child Welfare Personnel – Employees as defined in section 402.403, Florida Statutes, who are enrolled in an accredited master’s degree in social work or a certificate program, and maintain at least a grade of ‘B’ in all courses are exempt from tuition and fees.

(a) Eligible employees shall have an approved Department of Children and Families, community-based agency or a subcontractor waiver form stating that the necessary employment qualifications have been met.

~~(25)~~ Each university shall report the purpose, number, and value of all fee waivers granted annually in a format prescribed by the Board of Governors.

Authority: Section 7(d), Art. IX, Fla. Const.; History–Formerly BOR Rule 6C-7.008 and 6C-2.53, Amended 7-19-74, Amended and Renumbered 12-17-74, Amended 1-10-78, 9-28-81, 8-11-85, Formerly 6C-7.08, Amended 12-25-86, 9-7-87, 12-9-91, 11-9-92, 9-23-93, 8-1-94, 10-10-95, 4-16-96, 12-15-97, Amended and Renumbered as 7.008 9-25-08, Amended 12-10-09, 9-17-10, 11-08-12, 11-21-13,_____.

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: 2014-2015 State University System Operating Budget

PROPOSED COMMITTEE ACTION

Approve the 2014-2015 State University System Operating Budget.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution; Regulation 9.007

BACKGROUND INFORMATION

Each state university is required to submit a detailed operating plan for each budget entity for the 2014-2015 fiscal year. The State University System (SUS) operating budget consists of five different budget entities; 1) Education and General, 2) Contracts and Grants, 3) Auxiliary Enterprises, 4) Local Funds, and 5) Faculty Practice Plans.

1. The Education and General Budget Entity (E&G) includes the allocation of funds appropriated by the 2014 Legislature, student tuition, and other previously appropriated funds. The E&G budget entity contains resources that provide educational opportunities to citizens through instructional programs; research directed toward solving technical, social, and economic problems facing the state and nation; and public service programs. Universities have flexibility in the development of the E&G operating budget but must report in the traditional SUS categories.
- 2) The Contracts and Grants budget entity supports research and public service through awards from federal, state, and local sources.
- 3) Auxiliary Enterprises is comprised of ancillary support units such as student housing, food service, bookstores, parking services, and computer support.

- 4) The Local Funds entity consists of operating resources for student activities, athletics, concessions, student financial aid, technology fee, Board-approved local fees, and self-insurance programs.
- 5) Finally, the Faculty Practice Plans provide for clinical activities associated with the University of Florida and University of South Florida Health Centers, and the Florida State University, University of Central Florida, and Florida International University Medical Schools.

Each University Board of Trustees has approved an operating budget. The universities have developed their budgets in accordance with Board Regulation 9.007 State University System Operating Budgets. The regulation requires each university to maintain an unencumbered balance in the E&G fund equal to or greater than 5% of the University Board of Trustees approved operating budget. If the unencumbered balance falls below 5%, the University President must provide written notification and explanation.

Supporting Documentation Included: 2014-15 University Operating Budget Summaries

Facilitators/Presenters: Tim Jones

STATE UNIVERSITY SYSTEM OF FLORIDA 2014-2015 System Operating Budget University Summary Schedule I Reports

The state universities are required to submit a detailed plan for each budget entity for the 2014-2015 fiscal year. Universities have developed their budgets in accordance with Board of Governors Regulation 9.007 – State University System Operating Budgets. Each university Board of Trustees has approved an operating budget for the current year.

The State University System (SUS) operating budget consists of five different budget entities: 1) Education and General, which includes both non-medical and medical entities, 2) Contracts and Grants, 3) Auxiliary Enterprises, 4) Local Funds, and 5) Faculty Practice Plans which are affiliated with the universities' medical programs. A description of these entities is provided below:

1. The **Education and General** budget funds the general instruction, research, and public service operations of the universities. A large portion of the system's 2014-2015 beginning fund balance reserves (\$207.3 million) is dedicated to meeting the 5% reserve requirement set forth in Section 1011.40(2) of the Florida Statutes. Additionally, millions of dollars have been reserved by the SUS to cover the costs associated with the hiring of faculty, maintenance of facilities and equipment, the maintenance of each university's financial software system, various research enhancement programs and initiatives, and the potential for budget reduction shortfalls.

2. The **Contracts and Grants** budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of federal contracts or grants.

3. **Auxiliaries** are ancillary support units on each university campus. Major activities include housing, food services, bookstores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserves, repair and replacement reserves for future maintenance costs, construction and renovation of auxiliary facilities, and prior-year encumbrances.

4. **Local Funds** include the following university activities:

a) **Student Activities** – Supported primarily by the student activity and service fee revenues generated by the operations of student government, cultural events, organizations, and intramural/club sports.

b) **Financial Aid** – This activity represents the financial aid amounts for which the university is fiscally responsible. Examples include the student financial aid fee, bright futures, federal grants, college work study, and scholarships. The ending fund balance represents a timing difference between the receipt of the funds and disbursement to students.

c) **Concessions** – These resources are generated from various vending machines located on the university campuses.

d) **Athletics** – Revenues are primarily derived from the student athletic fee, ticket sales, and sales of other goods and services. Sufficient fund balances are maintained to provide the necessary support for ongoing athletic activities.

e) **Technology Fee** – Revenues generated from this fee are to be used to enhance instructional technology resources for students and faculty.

f) **Board Approved Local Fees** – Resources generated from these local fees are utilized to address student-based needs not currently being met through existing university services, operations, or another fee.

g) **Self-Insurance Programs** – These programs at UF, FSU, USF, UCF, and FIU are directed by the respective self-insurance councils and the captive insurance companies (these companies underwrite the risks of its owner and the owner's affiliates). These activities are supported by premiums charged to the insured individuals and entities (primarily medical faculty and institutions).

5. **Faculty Practice** – The Faculty Practice Plans collect and distribute income from faculty billings for patient services to the University of Florida, Florida State University, University of South Florida, University of Central Florida, and Florida International University Medical Schools and Health Science Centers.

Other notes referred to on the Summary Schedule I report are:

6. Other Receipts/Revenues includes items such as interest, penalties, refunds, admissions, fines, taxes, etc.

7. Other Non-Operating Expenditures include items such as refunds, payment of sales taxes, or indirect costs.

The following Summary Schedule I reports were provided to the Board of Governors' Office of Budgeting and Fiscal Policy as a component of the each state university's annual operating budget for fiscal year 2014-2015.

STATE UNIVERSITY SYSTEM OF FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General</u>	<u>Contracts & Grants</u>	<u>Auxiliaries</u>	<u>Local Funds</u>	<u>Faculty Practice</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 903,799,335	\$ 853,068,109	\$ 1,085,132,688	\$ 424,372,388	\$ 222,057,582	\$ 3,488,430,102
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 2,166,975,510	\$ -	\$ -	\$ -	\$ -	\$ 2,166,975,510
5 Lottery	\$ 284,802,023	\$ -	\$ -	\$ -	\$ -	\$ 284,802,023
6 Student Tuition	\$ 1,662,009,125	\$ -	\$ 45,376,042	\$ 14,217,540	\$ -	\$ 1,721,602,707
7 Phosphate Research	\$ 2,160,000	\$ -	\$ -	\$ -	\$ -	\$ 2,160,000
8 Other U.S. Grants	\$ 8,480,000	\$ 980,833,515	\$ -	\$ 1,269,391,584	\$ -	\$ 2,258,705,099
9 City or County Grants	\$ -	\$ 21,383,736	\$ -	\$ -	\$ -	\$ 21,383,736
10 State Grants	\$ -	\$ 104,421,853	\$ 76,032	\$ 274,438,615	\$ -	\$ 378,936,500
11 Other Grants and Donations	\$ -	\$ 175,364,892	\$ 12,309,065	\$ 261,576,972	\$ -	\$ 449,250,929
12 Donations / Contrib. Given to the State	\$ 7,264,643	\$ 598,986,022	\$ 1,607,102	\$ 7,404,020	\$ -	\$ 615,261,787
13 Sales of Goods / Services	\$ 19,517,192	\$ 28,044,609	\$ 596,911,875	\$ 154,653,751	\$ 106,587,452	\$ 905,714,879
14 Sales of Data Processing Services	\$ -	\$ -	\$ 11,196,361	\$ 6,332,000	\$ -	\$ 17,528,361
15 Fees	\$ 3,979,000	\$ 8,483,419	\$ 356,635,117	\$ 336,635,711	\$ 634,557,044	\$ 1,340,290,291
16 Miscellaneous Receipts	\$ -	\$ 28,878,264	\$ 291,834,002	\$ 112,919,921	\$ 195,411,878	\$ 629,044,065
17 Rent	\$ 1,619,821	\$ 38,679	\$ 91,615,383	\$ 917,283	\$ 340,818	\$ 94,531,984
18 Concessions	\$ -	\$ -	\$ 267,836	\$ 1,066,103	\$ -	\$ 1,333,939
19 Assessments / Services	\$ -	\$ -	\$ -	\$ 12,985,018	\$ -	\$ 12,985,018
20 Other Reciepts / Revenues ⁶	\$ 5,978,637	\$ 4,592,411	\$ 60,866,788	\$ 38,600,826	\$ 604,710	\$ 110,643,372
21 Subtotal:	\$ 4,162,785,951	\$ 1,951,027,400	\$ 1,468,695,603	\$ 2,491,139,344	\$ 937,501,902	\$ 11,011,150,200
22 Transfers In	\$ 99,215	\$ 563,904,046	\$ 238,655,342	\$ 179,874,129	\$ 955,753	\$ 983,488,485
23 Total - Receipts / Revenues:	\$ 4,162,885,166	\$ 2,514,931,446	\$ 1,707,350,945	\$ 2,671,013,473	\$ 938,457,655	\$ 11,994,638,685
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 2,909,689,583	\$ 985,287,136	\$ 443,594,186	\$ 179,544,136	\$ 162,294,377	\$ 4,680,409,418
27 Other Personal Services	\$ 210,204,008	\$ 294,366,408	\$ 103,625,611	\$ 27,879,419	\$ 4,931,608	\$ 641,007,054
28 Expenses	\$ 839,959,407	\$ 712,270,327	\$ 813,262,833	\$ 1,377,586,006	\$ 179,915,182	\$ 3,922,993,755
29 Operating Capital Outlay	\$ 10,164,617	\$ 41,604,742	\$ 23,824,669	\$ 8,947,326	\$ 10,458,948	\$ 95,000,302
30 Risk Management	\$ 21,909,338	\$ 608,535	\$ 1,529,901	\$ 572,985	\$ -	\$ 24,620,759
31 Financial Aid	\$ 100,496,034	\$ 500,343	\$ 27,182	\$ 526,774,854	\$ -	\$ 627,798,413
32 Scholarships	\$ 10,595,361	\$ -	\$ 615,483	\$ 429,995,094	\$ -	\$ 441,205,938

STATE UNIVERSITY SYSTEM OF FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General</u>	<u>Contracts & Grants</u>	<u>Auxiliaries</u>	<u>Local Funds</u>	<u>Faculty Practice</u>	<u>Summary</u>
33 Waivers	\$ 1,591,584	\$ -	\$ -	\$ -	\$ -	\$ 1,591,584
34 Finance Expense	\$ 197,212	\$ 2,498,342	\$ 4,520,876	\$ 1,550,487	\$ 2,467,636	\$ 11,234,553
35 Debt Service	\$ 1,349,245	\$ -	\$ 54,950,644	\$ 9,356,195	\$ 76,890	\$ 65,732,974
36 Salary Incentive Payments	\$ 66,000	\$ -	\$ -	\$ -	\$ -	\$ 66,000
37 Law Enforcement Incentive Payments	\$ 93,639	\$ -	\$ -	\$ -	\$ -	\$ 93,639
38 Library Resources	\$ 43,856,581	\$ -	\$ 1,077,710	\$ 2,000	\$ -	\$ 44,936,291
39 Institute of Government	\$ 835,708	\$ -	\$ -	\$ -	\$ -	\$ 835,708
40 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
41 Black Male Explorers Program	\$ 132,000	\$ -	\$ -	\$ -	\$ -	\$ 132,000
42 Phosphate Research	\$ 2,160,000	\$ -	\$ -	\$ -	\$ -	\$ 2,160,000
43 Other Operating Category	\$ 8,156,296	\$ -	\$ -	\$ -	\$ -	\$ 8,156,296
44 Total Operating Expenditures :	<u>\$ 4,161,456,613</u>	<u>\$ 2,037,135,833</u>	<u>\$ 1,447,029,095</u>	<u>\$ 2,562,208,502</u>	<u>\$ 360,144,641</u>	<u>\$ 10,567,974,684</u>
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers	\$ 522,806	\$ 518,826,816	\$ 273,639,393	\$ 111,922,582	\$ 575,735,223	\$ 1,480,646,820
48 Fixed Capital Outlay	\$ -	\$ -	\$ -	\$ 700,000	\$ -	\$ 700,000
49 Carryforward (From Prior Period Funds)	\$ 377,688,396	\$ -	\$ -	\$ -	\$ -	\$ 377,688,396
50 Other ⁷	\$ 1,772,081	\$ -	\$ -	\$ -	\$ -	\$ 1,772,081
51 Total Non-Operating Expenditures :	<u>\$ 379,983,283</u>	<u>\$ 518,826,816</u>	<u>\$ 273,639,393</u>	<u>\$ 112,622,582</u>	<u>\$ 575,735,223</u>	<u>\$ 1,860,807,297</u>
52						
53 Ending Fund Balance :	<u>\$ 525,244,605</u>	<u>\$ 812,036,906</u>	<u>\$ 1,071,815,145</u>	<u>\$ 420,554,777</u>	<u>\$ 224,635,373</u>	<u>\$ 3,054,286,806</u>
54						
55 Fund Balance Increase / Decrease :	\$ (378,554,730)	\$ (41,031,203)	\$ (13,317,543)	\$ (3,817,611)	\$ 2,577,791	\$ (434,143,296)
56 Fund Balance Percentage Change :	-41.88%	-4.81%	-1.23%	-0.90%	1.16%	-12.45%

UNIVERSITY OF FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>IFAS E&G¹</u>	<u>HSC E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 108,700,808	\$ 33,295,202	\$ 17,514,995	\$ 555,194,934	\$ 183,785,450	\$ 208,784,080	\$ 186,979,750	\$ 1,294,255,219
2								
3 <u>Receipts/Revenues</u>								
4 General Revenue	\$ 323,882,695	\$ 140,472,462	\$ 104,892,019					\$ 569,247,176
5 Lottery	\$ 47,139,011	\$ 12,533,877	\$ 5,796,416					\$ 65,469,304
6 Student Tuition	\$ 288,871,776	\$ -	\$ 38,463,434					\$ 327,335,210
7 Phosphate Research								\$ -
8 Other U.S. Grants		\$ 8,480,000		\$ 282,593,377		\$ 298,061,120		\$ 589,134,497
9 City or County Grants								\$ -
10 State Grants				\$ 40,700,417		\$ 68,226,485		\$ 108,926,902
11 Other Grants and Donations				\$ 102,656,782	\$ 588,955	\$ 44,401,417		\$ 147,647,154
12 Donations / Contrib. Given to the State			\$ 7,264,643	\$ 598,986,022	\$ 1,607,102	\$ 7,404,020		\$ 615,261,787
13 Sales of Goods / Services		\$ 1,714,500	\$ 17,802,692	\$ 7,556,846	\$ 219,436,635	\$ 79,858,504	\$ 88,963,871	\$ 415,333,048
14 Sales of Data Processing Services						\$ 6,332,000		\$ 6,332,000
15 Fees	\$ 3,979,000				\$ 82,729,497	\$ 26,057,115	\$ 492,972,986	\$ 605,738,598
16 Miscellaneous Receipts				\$ 116,157	\$ 7,633,141	\$ 2,097,981	\$ 113,465,235	\$ 123,312,514
17 Rent		\$ 669,999	\$ 949,822	\$ 38,679	\$ 5,177,575			\$ 6,836,075
18 Concessions					\$ 233,836	\$ 550,000		\$ 783,836
19 Assessments / Services						\$ 12,807,840		\$ 12,807,840
20 Other Reciepts / Revenues ⁶	\$ 150,000		\$ 2,365	\$ 1,005,720	\$ 2,021,976	\$ 16,325,843	\$ 540,050	\$ 20,045,954
21 Subtotal:	\$ 664,022,482	\$ 163,870,838	\$ 175,171,391	\$ 1,033,654,000	\$ 319,428,717	\$ 562,122,325	\$ 695,942,142	\$ 3,614,211,895
22 Transfers In		\$ 80,000	\$ 19,215	\$ 409,084,596	\$ 104,714,538	\$ 41,886,196	\$ -	\$ 555,784,545
23 Total - Receipts / Revenues:	\$ 664,022,482	\$ 163,950,838	\$ 175,190,606	\$ 1,442,738,596	\$ 424,143,255	\$ 604,008,521	\$ 695,942,142	\$ 4,169,996,440
24								
25 <u>Operating Expenditures</u>								
26 Salaries and Benefits	\$ 534,097,106	\$ 133,249,190	\$ 128,593,006	\$ 569,577,389	\$ 106,401,676	\$ 50,826,307	\$ 58,077,900	\$ 1,580,822,574
27 Other Personal Services	\$ 47,881,507	\$ 677,771	\$ 6,600,921	\$ 154,771,564	\$ 24,756,414	\$ 3,455,112		\$ 238,143,289
28 Expenses	\$ 56,673,639	\$ 35,287,494	\$ 36,125,259	\$ 308,130,737	\$ 191,756,284	\$ 73,704,996	\$ 135,273,422	\$ 836,951,831
29 Operating Capital Outlay	\$ 321,977	\$ 9,800	\$ 1,712,924	\$ 16,481,589	\$ 11,814,074	\$ 2,647,956	\$ 10,346,583	\$ 43,334,903
30 Risk Management	\$ 2,851,393	\$ 1,756,198	\$ 1,239,867					\$ 5,847,458
31 Financial Aid	\$ 1,737,381							\$ 1,737,381
32 Scholarships	\$ 6,600,000					\$ 427,595,965		\$ 434,195,965
33 Waivers	\$ 1,415,510							\$ 1,415,510
34 Finance Expense			\$ 197,212	\$ 2,498,342	\$ 4,520,876		\$ 2,467,636	\$ 9,684,066
35 Debt Service					\$ 10,672,395	\$ 6,256,195	\$ 76,890	\$ 17,005,480
36 Salary Incentive Payments								\$ -
37 Law Enforcement Incentive Payments								\$ -
38 Library Resources	\$ 7,839,810		\$ 1,442,857					\$ 9,282,667

UNIVERSITY OF FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>IFAS E&G¹</u>	<u>HSC E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government								\$ -
40 Regional Data Centers - SUS								\$ -
41 Black Male Explorers Program								\$ -
42 Phosphate Research								\$ -
43 Other Operating Category								\$ -
44 Total Operating Expenditures :	\$ 659,418,323	\$ 170,980,453	\$ 175,912,046	\$ 1,051,459,621	\$ 349,921,719	\$ 564,486,531	\$ 206,242,431	\$ 3,178,421,124
45								
46 <u>Non-Operating Expenditures</u>								
47 Transfers		\$ 32,565	\$ 490,241	\$ 437,152,475	\$ 82,894,228	\$ 27,543,486	\$ 485,432,564	\$ 1,033,545,559
48 Fixed Capital Outlay						\$ 700,000		\$ 700,000
49 Carryforward (From Prior Period Funds)	\$ 50,831,583	\$ 12,146,424	\$ 6,507,478			\$ -		\$ 69,485,485
50 Other ⁷						\$ -		\$ -
51 Total Non-Operating Expenditures :	\$ 50,831,583	\$ 12,178,989	\$ 6,997,719	\$ 437,152,475	\$ 82,894,228	\$ 28,243,486	\$ 485,432,564	\$ 1,103,731,044
52								
53 Ending Fund Balance :	\$ 62,473,384	\$ 14,086,598	\$ 9,795,836	\$ 509,321,434	\$ 175,112,758	\$ 220,062,584	\$ 191,246,897	\$ 1,182,099,491
54								
55 Fund Balance Increase / Decrease :	\$ (46,227,424)	\$ (19,208,604)	\$ (7,719,159)	\$ (45,873,500)	\$ (8,672,692)	\$ 11,278,504	\$ 4,267,147	\$ (112,155,728)
56 Fund Balance Percentage Change :	-42.53%	-57.69%	-44.07%	-8.26%	-4.72%	5.40%	2.28%	-8.67%

FLORIDA STATE UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School - E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 140,449,952	\$ 31,901,682	\$ 141,266,944	\$ 177,099,151	\$ 69,085,438	\$ 229	\$ 559,803,396
2							
3 <u>Receipts/Revenues</u>							
4 General Revenue	\$ 286,406,819	\$ 34,404,267					\$ 320,811,086
5 Lottery	\$ 39,510,136	\$ 605,115					\$ 40,115,251
6 Student Tuition	\$ 192,332,292	\$ 9,973,827					\$ 202,306,119
7 Phosphate Research							\$ -
8 Other U.S. Grants			\$ 168,000,000		\$ 51,861,797		\$ 219,861,797
9 City or County Grants			\$ 450,000				\$ 450,000
10 State Grants			\$ 22,355,850		\$ 61,162,464		\$ 83,518,314
11 Other Grants and Donations			\$ 30,000,000	\$ 11,700,000	\$ 15,333,636		\$ 57,033,636
12 Donations / Contrib. Given to the State							\$ -
13 Sales of Goods / Services			\$ 11,752,000	\$ 107,311,625	\$ 60,640,096	\$ 6,826,840	\$ 186,530,561
14 Sales of Data Processing Services				\$ 11,196,361			\$ 11,196,361
15 Fees			\$ 420,700	\$ 65,400,435	\$ 28,654,205		\$ 94,475,340
16 Miscellaneous Receipts							\$ -
17 Rent				\$ 42,654,294	\$ 917,283		\$ 43,571,577
18 Concessions							\$ -
19 Assessments / Services							\$ -
20 Other Reciepts / Revenues ⁶	\$ 1,000,000	\$ 250,000	\$ 2,298,000	\$ 7,225,044	\$ 7,438,568	\$ 1,000	\$ 18,212,612
21 Subtotal:	\$ 519,249,247	\$ 45,233,209	\$ 235,276,550	\$ 245,487,759	\$ 226,008,049	\$ 6,827,840	\$ 1,278,082,654
22 Transfers In					\$ 11,640,266		\$ 11,640,266
23 Total - Receipts / Revenues:	\$ 519,249,247	\$ 45,233,209	\$ 235,276,550	\$ 245,487,759	\$ 237,648,315	\$ 6,827,840	\$ 1,289,722,920
24							
25 <u>Operating Expenditures</u>							
26 Salaries and Benefits	\$ 364,905,261	\$ 37,222,882	\$ 85,970,600	\$ 79,393,159	\$ 27,501,262	\$ 4,074,447	\$ 599,067,611
27 Other Personal Services	\$ 30,740,563	\$ 4,522,257	\$ 35,910,250	\$ 17,336,193	\$ 6,144,990	\$ 2,607,254	\$ 97,261,507
28 Expenses	\$ 96,361,944	\$ 2,954,788	\$ 85,032,500	\$ 125,908,886	\$ 206,291,005	\$ 44,448	\$ 516,593,571
29 Operating Capital Outlay	\$ 311,740	\$ 200,000	\$ 18,105,200	\$ 2,253,744	\$ 987,611		\$ 21,858,295
30 Risk Management	\$ 1,986,543	\$ 83,282					\$ 2,069,825
31 Financial Aid	\$ 15,844,767						\$ 15,844,767
32 Scholarships							\$ -
33 Waivers	\$ 45,236						\$ 45,236
34 Finance Expense							\$ -
35 Debt Service				\$ 20,360,000			\$ 20,360,000
36 Salary Incentive Payments							\$ -
37 Law Enforcement Incentive Payments	\$ 78,840						\$ 78,840
38 Library Resources	\$ 7,138,645			\$ 1,000,000			\$ 8,138,645

FLORIDA STATE UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School - E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government	\$ 835,708						\$ 835,708
40 Regional Data Centers - SUS							\$ -
41 Black Male Explorers Program							\$ -
42 Phosphate Research							\$ -
43 Other Operating Category							\$ -
44 Total Operating Expenditures :	<u>\$ 518,249,247</u>	<u>\$ 44,983,209</u>	<u>\$ 225,018,550</u>	<u>\$ 246,251,982</u>	<u>\$ 240,924,868</u>	<u>\$ 6,726,149</u>	<u>\$ 1,282,154,005</u>
45							
46 <u>Non-Operating Expenditures</u>							
47 Transfers			\$ 6,738,325	\$ 19,985,391	\$ 5,437,911	\$ 89,194	\$ 32,250,821
48 Fixed Capital Outlay							\$ -
49 Carryforward (From Prior Period Funds)	\$ 75,000,000	\$ 7,340,438					\$ 82,340,438
50 Other ⁷		\$ 250,000					\$ 250,000
51 Total Non-Operating Expenditures :	<u>\$ 75,000,000</u>	<u>\$ 7,590,438</u>	<u>\$ 6,738,325</u>	<u>\$ 19,985,391</u>	<u>\$ 5,437,911</u>	<u>\$ 89,194</u>	<u>\$ 114,841,259</u>
52							
53 Ending Fund Balance :	<u>\$ 66,449,952</u>	<u>\$ 24,561,244</u>	<u>\$ 144,786,619</u>	<u>\$ 156,349,537</u>	<u>\$ 60,370,974</u>	<u>\$ 12,726</u>	<u>\$ 452,531,052</u>
54							
55 Fund Balance Increase / Decrease :	\$ (74,000,000)	\$ (7,340,438)	\$ 3,519,675	\$ (20,749,614)	\$ (8,714,464)	\$ 12,497	\$ (107,272,344)
56 Fund Balance Percentage Change :	-52.69%	-23.01%	2.49%	-11.72%	-12.61%	5457.21%	-19.16%

FLORIDA AGRICULTURAL & MECHANICAL UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 49,919,549	\$ 980,000	\$ 19,630,296	\$ 15,594,803	\$ -	\$ 86,124,648
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 97,552,206					\$ 97,552,206
5 Lottery	\$ 14,834,223					\$ 14,834,223
6 Student Tuition	\$ 72,446,932					\$ 72,446,932
7 Phosphate Research						\$ -
8 Other U.S. Grants		\$ 47,668,811		\$ 474,489		\$ 48,143,300
9 City or County Grants						\$ -
10 State Grants		\$ 3,548,993	\$ 76,032	\$ 54,000		\$ 3,679,025
11 Other Grants and Donations				\$ 55,356,205		\$ 55,356,205
12 Donations / Contrib. Given to the State						\$ -
13 Sales of Goods / Services			\$ 26,685,786	\$ 3,434,750		\$ 30,120,536
14 Sales of Data Processing Services						\$ -
15 Fees			\$ 6,093,513	\$ 11,060,489		\$ 17,154,002
16 Miscellaneous Receipts			\$ 2,956,420			\$ 2,956,420
17 Rent						\$ -
18 Concessions						\$ -
19 Assessments / Services						\$ -
20 Other Reciepts / Revenues ⁶		\$ 59,049	\$ 1,100,000	\$ 10,979,977		\$ 12,139,026
21 Subtotal:	\$ 184,833,361	\$ 51,276,853	\$ 36,911,751	\$ 81,359,910	\$ -	\$ 354,381,875
22 Transfers In			\$ 3,662,615	\$ 515,542		\$ 4,178,157
23 Total - Receipts / Revenues:	\$ 184,833,361	\$ 51,276,853	\$ 40,574,366	\$ 81,875,452	\$ -	\$ 358,560,032
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 129,708,746	\$ 22,038,929	\$ 8,756,916	\$ 5,015,861		\$ 165,520,452
27 Other Personal Services	\$ 8,077,471	\$ 6,411,934	\$ 3,290,439	\$ 593,821		\$ 18,373,665
28 Expenses	\$ 37,203,689	\$ 22,062,927	\$ 20,168,866	\$ 76,852,016		\$ 156,287,498
29 Operating Capital Outlay	\$ 488,057	\$ 732,876	\$ 336,939	\$ 90,053		\$ 1,647,925
30 Risk Management	\$ 1,265,683					\$ 1,265,683
31 Financial Aid	\$ 624,417					\$ 624,417
32 Scholarships	\$ 3,203,572					\$ 3,203,572
33 Waivers	\$ 130,838					\$ 130,838
34 Finance Expense						\$ -
35 Debt Service	\$ 1,349,245					\$ 1,349,245
36 Salary Incentive Payments						\$ -
37 Law Enforcement Incentive Payments	\$ 14,799					\$ 14,799
38 Library Resources	\$ 2,634,844					\$ 2,634,844

FLORIDA AGRICULTURAL & MECHANICAL UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government						\$ -
40 Regional Data Centers - SUS						\$ -
41 Black Male Explorers Program	\$ 132,000					\$ 132,000
42 Phosphate Research						\$ -
43 Other Operating Category						\$ -
44 Total Operating Expenditures :	<u>\$ 184,833,361</u>	<u>\$ 51,246,666</u>	<u>\$ 32,553,160</u>	<u>\$ 82,551,751</u>	<u>\$ -</u>	<u>\$ 351,184,938</u>
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers		\$ 71,829	\$ 9,397,696	\$ 2,000,087		\$ 11,469,612
48 Fixed Capital Outlay						\$ -
49 Carryforward (From Prior Period Funds)	\$ 6,036,016					\$ 6,036,016
50 Other ⁷						\$ -
51 Total Non-Operating Expenditures :	<u>\$ 6,036,016</u>	<u>\$ 71,829</u>	<u>\$ 9,397,696</u>	<u>\$ 2,000,087</u>	<u>\$ -</u>	<u>\$ 17,505,628</u>
52						
53 Ending Fund Balance :	<u>\$ 43,883,533</u>	<u>\$ 938,358</u>	<u>\$ 18,253,806</u>	<u>\$ 12,918,417</u>	<u>\$ -</u>	<u>\$ 75,994,114</u>
54						
55 Fund Balance Increase / Decrease :	\$ (6,036,016)	\$ (41,642)	\$ (1,376,490)	\$ (2,676,386)	\$ -	\$ (10,130,534)
56 Fund Balance Percentage Change :	-12.09%	0.00%	-7.01%	-17.16%	-	-11.76%

UNIVERSITY OF SOUTH FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>HSC E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 119,193,334	\$ 48,021,142	\$ 75,496,034	\$ 156,299,566	\$ 18,993,086	\$ 41,808,471	\$ 459,811,633
2							
3 <u>Receipts/Revenues</u>							
4 General Revenue	\$ 240,533,239	\$ 65,307,227					\$ 305,840,466
5 Lottery	\$ 37,894,779	\$ 9,349,672					\$ 47,244,451
6 Student Tuition	\$ 194,197,422	\$ 55,965,096					\$ 250,162,518
7 Phosphate Research							\$ -
8 Other U.S. Grants			\$ 259,595,636		\$ 315,516,764		\$ 575,112,400
9 City or County Grants							\$ -
10 State Grants			\$ 25,000,000		\$ 47,559,619		\$ 72,559,619
11 Other Grants and Donations							\$ -
12 Donations / Contrib. Given to the State							\$ -
13 Sales of Goods / Services			\$ 175,500	\$ 76,661,648	\$ 9,727,600		\$ 86,564,748
14 Sales of Data Processing Services							\$ -
15 Fees				\$ 57,440,068	\$ 62,548,247	\$ 141,584,058	\$ 261,572,373
16 Miscellaneous Receipts			\$ 437,000	\$ 45,522,360	\$ 14,482,320	\$ 79,028,856	\$ 139,470,536
17 Rent							\$ -
18 Concessions							\$ -
19 Assessments / Services							\$ -
20 Other Reciepts / Revenues ⁶	\$ 534,547	\$ 232,081	\$ 657,000	\$ 28,599,441	\$ 65,287	\$ 63,660	\$ 30,152,016
21 Subtotal:	\$ 473,159,987	\$ 130,854,076	\$ 285,865,136	\$ 208,223,517	\$ 449,899,837	\$ 220,676,574	\$ 1,768,679,127
22 Transfers In			\$ 98,315,000	\$ 45,622,407	\$ 30,861,956		\$ 174,799,363
23 Total - Receipts / Revenues:	\$ 473,159,987	\$ 130,854,076	\$ 384,180,136	\$ 253,845,924	\$ 480,761,793	\$ 220,676,574	\$ 1,943,478,490
24							
25 <u>Operating Expenditures</u>							
26 Salaries and Benefits	\$ 301,483,479	\$ 94,408,420	\$ 140,048,493	\$ 65,691,408	\$ 21,234,082	\$ 97,482,969	\$ 720,348,851
27 Other Personal Services	\$ 32,076,308	\$ 4,266,568	\$ 69,194,136	\$ 15,091,972	\$ 4,964,745	\$ 2,324,354	\$ 127,918,083
28 Expenses	\$ 115,533,235	\$ 29,988,935	\$ 123,251,000	\$ 107,254,213	\$ 425,121,315	\$ 31,660,802	\$ 832,809,500
29 Operating Capital Outlay	\$ 1,407,760	\$ 286,500	\$ 3,135,000	\$ 3,989,224	\$ 1,863,232		\$ 10,681,716
30 Risk Management	\$ 2,942,011	\$ 283,607	\$ 376,000	\$ 952,504	\$ 572,985		\$ 5,127,107
31 Financial Aid	\$ 11,993,163	\$ 1,343,092					\$ 13,336,255
32 Scholarships							\$ -
33 Waivers							\$ -
34 Finance Expense							\$ -
35 Debt Service				\$ 5,253,080	\$ 2,325,000		\$ 7,578,080
36 Salary Incentive Payments							\$ -
37 Law Enforcement Incentive Payments							\$ -
38 Library Resources	\$ 5,421,390	\$ 810,941		\$ 71,510	\$ 2,000		\$ 6,305,841

UNIVERSITY OF SOUTH FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>HSC E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government							\$ -
40 Regional Data Centers - SUS							\$ -
41 Black Male Explorers Program							\$ -
42 Phosphate Research							\$ -
43 Other Operating Category	\$ -						\$ -
44 Total Operating Expenditures :	<u>\$ 470,857,346</u>	<u>\$ 131,388,063</u>	<u>\$ 336,004,629</u>	<u>\$ 198,303,911</u>	<u>\$ 456,083,359</u>	<u>\$ 131,468,125</u>	<u>\$ 1,724,105,433</u>
45							
46 <u>Non-Operating Expenditures</u>							
47 Transfers			\$ 48,000,000	\$ 61,574,806	\$ 27,142,247	\$ 90,213,465	\$ 226,930,518
48 Fixed Capital Outlay							\$ -
49 Carryforward (From Prior Period Funds)	\$ 38,541,253	\$ 26,352,747					\$ 64,894,000
50 Other ⁷		\$ 232,081					\$ 232,081
51 Total Non-Operating Expenditures :	<u>\$ 38,541,253</u>	<u>\$ 26,584,828</u>	<u>\$ 48,000,000</u>	<u>\$ 61,574,806</u>	<u>\$ 27,142,247</u>	<u>\$ 90,213,465</u>	<u>\$ 292,056,599</u>
52							
53 Ending Fund Balance :	<u>\$ 82,954,722</u>	<u>\$ 20,902,327</u>	<u>\$ 75,671,541</u>	<u>\$ 150,266,773</u>	<u>\$ 16,529,273</u>	<u>\$ 40,803,455</u>	<u>\$ 387,128,091</u>
54							
55 Fund Balance Increase / Decrease :	\$ (36,238,612)	\$ (27,118,815)	\$ 175,507	\$ (6,032,793)	\$ (2,463,813)	\$ (1,005,016)	\$ (72,683,542)
56 Fund Balance Percentage Change :	-30.40%	-56.47%	0.23%	-3.86%	-12.97%	-2.40%	-15.81%

FLORIDA ATLANTIC UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 51,423,875	\$ 9,919,167	\$ 13,118,015	\$ 97,639,477	\$ 11,326,601	\$ -	\$ 183,427,135
2							
3 <u>Receipts/Revenues</u>							
4 General Revenue	\$ 121,094,913	\$ 14,344,890					\$ 135,439,803
5 Lottery	\$ 20,785,531						\$ 20,785,531
6 Student Tuition	\$ 129,145,158	\$ 8,238,505					\$ 137,383,663
7 Phosphate Research							\$ -
8 Other U.S. Grants			\$ 39,758,362		\$ 44,402,740		\$ 84,161,102
9 City or County Grants							\$ -
10 State Grants			\$ 3,568,058		\$ 15,633,953		\$ 19,202,011
11 Other Grants and Donations					\$ 127,740,977		\$ 127,740,977
12 Donations / Contrib. Given to the State							\$ -
13 Sales of Goods / Services				\$ 60,367,384			\$ 60,367,384
14 Sales of Data Processing Services							\$ -
15 Fees			\$ 7,645,839	\$ 35,214,307	\$ 35,997,186		\$ 78,857,332
16 Miscellaneous Receipts				\$ 5,030,615	\$ 2,049,376		\$ 7,079,991
17 Rent							\$ -
18 Concessions							\$ -
19 Assessments / Services							\$ -
20 Other Reciepts / Revenues ⁶					\$ 2,644,000		\$ 2,644,000
21 Subtotal:	\$ 271,025,602	\$ 22,583,395	\$ 50,972,259	\$ 100,612,306	\$ 228,468,232	\$ -	\$ 673,661,794
22 Transfers In			\$ 4,526,000	\$ 19,225,909	\$ 9,551,404		\$ 33,303,313
23 Total - Receipts / Revenues:	\$ 271,025,602	\$ 22,583,395	\$ 55,498,259	\$ 119,838,215	\$ 238,019,636	\$ -	\$ 706,965,107
24							
25 <u>Operating Expenditures</u>							
26 Salaries and Benefits	\$ 175,245,486	\$ 15,084,239	\$ 21,113,128	\$ 29,076,449	\$ 9,171,593	\$ 93,640	\$ 249,784,535
27 Other Personal Services	\$ 19,079,822	\$ 1,937,235	\$ 7,064,820	\$ 17,183,353	\$ 2,203,051		\$ 47,468,281
28 Expenses	\$ 70,159,272	\$ 5,561,921	\$ 22,820,291	\$ 66,368,934	\$ 219,548,841	\$ (93,640)	\$ 384,365,619
29 Operating Capital Outlay			\$ -				\$ -
30 Risk Management	\$ 1,810,956						\$ 1,810,956
31 Financial Aid	\$ 4,730,066						\$ 4,730,066
32 Scholarships							\$ -
33 Waivers							\$ -
34 Finance Expense							\$ -
35 Debt Service							\$ -
36 Salary Incentive Payments							\$ -
37 Law Enforcement Incentive Payments							\$ -
38 Library Resources							\$ -

FLORIDA ATLANTIC UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government							\$ -
40 Regional Data Centers - SUS							\$ -
41 Black Male Explorers Program							\$ -
42 Phosphate Research							\$ -
43 Other Operating Category							\$ -
44 Total Operating Expenditures :	<u>\$ 271,025,602</u>	<u>\$ 22,583,395</u>	<u>\$ 50,998,239</u>	<u>\$ 112,628,736</u>	<u>\$ 230,923,485</u>	<u>\$ -</u>	<u>\$ 688,159,457</u>
45							
46 <u>Non-Operating Expenditures</u>							
47 Transfers			\$ 4,500,000	\$ 13,894,050	\$ 9,170,858		\$ 27,564,908
48 Fixed Capital Outlay							\$ -
49 Carryforward (From Prior Period Funds)	\$ 37,872,595	\$ 8,789,997					\$ 46,662,592
50 Other ⁷							\$ -
51 Total Non-Operating Expenditures :	<u>\$ 37,872,595</u>	<u>\$ 8,789,997</u>	<u>\$ 4,500,000</u>	<u>\$ 13,894,050</u>	<u>\$ 9,170,858</u>	<u>\$ -</u>	<u>\$ 74,227,500</u>
52							
53 Ending Fund Balance :	<u>\$ 13,551,280</u>	<u>\$ 1,129,170</u>	<u>\$ 13,118,035</u>	<u>\$ 90,954,906</u>	<u>\$ 9,251,894</u>	<u>\$ -</u>	<u>\$ 128,005,285</u>
54							
55 Fund Balance Increase / Decrease :	\$ (37,872,595)	\$ (8,789,997)	\$ 20	\$ (6,684,571)	\$ (2,074,707)	\$ -	\$ (55,421,850)
56 Fund Balance Percentage Change :	-73.65%	-88.62%	0.00%	-6.85%	-18.32%	-	-30.21%

UNIVERSITY OF WEST FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 34,891,273	\$ 9,568,541	\$ 19,184,376	\$ 11,641,561	\$ -	\$ 75,285,751
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 73,840,641					\$ 73,840,641
5 Lottery	\$ 8,138,968					\$ 8,138,968
6 Student Tuition	\$ 45,798,775					\$ 45,798,775
7 Phosphate Research						\$ -
8 Other U.S. Grants		\$ 11,064,689		\$ 56,000,000		\$ 67,064,689
9 City or County Grants		\$ 8,734,071				\$ 8,734,071
10 State Grants						\$ -
11 Other Grants and Donations		\$ 4,406,457		\$ 5,550		\$ 4,412,007
12 Donations / Contrib. Given to the State						\$ -
13 Sales of Goods / Services			\$ 1,647,312	\$ 13,000		\$ 1,660,312
14 Sales of Data Processing Services						\$ -
15 Fees		\$ 51,763	\$ 11,582,986	\$ 13,193,500		\$ 24,828,249
16 Miscellaneous Receipts		\$ 1,561,785	\$ 3,278,328	\$ 31,331,416		\$ 36,171,529
17 Rent			\$ 302,810			\$ 302,810
18 Concessions						\$ -
19 Assessments / Services						\$ -
20 Other Reciepts / Revenues ⁶	\$ 375,000	\$ 150,000	\$ 6,119,442	\$ 57,898		\$ 6,702,340
21 Subtotal:	\$ 128,153,384	\$ 25,968,765	\$ 22,930,878	\$ 100,601,364	\$ -	\$ 277,654,391
22 Transfers In				\$ -		\$ -
23 Total - Receipts / Revenues:	\$ 128,153,384	\$ 25,968,765	\$ 22,930,878	\$ 100,601,364	\$ -	\$ 277,654,391
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 70,893,634	\$ 5,351,889	\$ 5,707,647	\$ 3,635,076		\$ 85,588,246
27 Other Personal Services	\$ 7,936,085	\$ 2,988,696	\$ 3,139,174	\$ 1,274,649		\$ 15,338,604
28 Expenses	\$ 38,527,870	\$ 17,156,692	\$ 13,002,841	\$ 91,512,178		\$ 160,199,581
29 Operating Capital Outlay		\$ 416,155	\$ 142,983	\$ 1,145,474		\$ 1,704,612
30 Risk Management	\$ 521,250					\$ 521,250
31 Financial Aid	\$ 742,949					\$ 742,949
32 Scholarships						\$ -
33 Waivers						\$ -
34 Finance Expense						\$ -
35 Debt Service						\$ -
36 Salary Incentive Payments						\$ -
37 Law Enforcement Incentive Payments						\$ -
38 Library Resources	\$ 1,000,300					\$ 1,000,300

UNIVERSITY OF WEST FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government						\$ -
40 Regional Data Centers - SUS						\$ -
41 Black Male Explorers Program						\$ -
42 Phosphate Research						\$ -
43 Other Operating Category	\$ 8,156,296					\$ 8,156,296
44 Total Operating Expenditures :	<u>\$ 127,778,384</u>	<u>\$ 25,913,432</u>	<u>\$ 21,992,645</u>	<u>\$ 97,567,377</u>	<u>\$ -</u>	<u>\$ 273,251,838</u>
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers		\$ (400,000)	\$ 881,137	\$ 898,183		\$ 1,379,320
48 Fixed Capital Outlay						\$ -
49 Carryforward (From Prior Period Funds)	\$ 10,000,000					\$ 10,000,000
50 Other ⁷	\$ -					\$ -
51 Total Non-Operating Expenditures :	<u>\$ 10,000,000</u>	<u>\$ (400,000)</u>	<u>\$ 881,137</u>	<u>\$ 898,183</u>	<u>\$ -</u>	<u>\$ 11,379,320</u>
52						
53 Ending Fund Balance :	<u>\$ 25,266,273</u>	<u>\$ 10,023,874</u>	<u>\$ 19,241,472</u>	<u>\$ 13,777,365</u>	<u>\$ -</u>	<u>\$ 68,308,984</u>
54						
55 Fund Balance Increase / Decrease :	\$ (9,625,000)	\$ 455,333	\$ 57,096	\$ 2,135,804	\$ -	\$ (6,976,767)
56 Fund Balance Percentage Change :	-27.59%	4.76%	0.30%	18.35%	-	-9.27%

UNIVERSITY OF CENTRAL FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 140,914,332	\$ 17,171,991	\$ 34,147,673	\$ 175,877,974	\$ 47,224,464	\$ (7,556,219)	\$ 407,780,215
2							
3 <u>Receipts/Revenues</u>							
4 General Revenue	\$ 240,215,698	\$ 25,757,576					\$ 265,973,274
5 Lottery	\$ 36,011,738						\$ 36,011,738
6 Student Tuition	\$ 243,337,048	\$ 13,245,910		\$ 4,353,025			\$ 260,935,983
7 Phosphate Research							\$ -
8 Other U.S. Grants			\$ 98,167,146		\$ 370,546,471		\$ 468,713,617
9 City or County Grants							\$ -
10 State Grants			\$ 7,502,765		\$ 59,891,386		\$ 67,394,151
11 Other Grants and Donations			\$ 23,221,598				\$ 23,221,598
12 Donations / Contrib. Given to the State							\$ -
13 Sales of Goods / Services							\$ -
14 Sales of Data Processing Services							\$ -
15 Fees				\$ 66,056,320	\$ 59,543,241		\$ 125,599,561
16 Miscellaneous Receipts			\$ 468,866	\$ 147,755,451	\$ 43,835,372	\$ 2,917,787	\$ 194,977,476
17 Rent							\$ -
18 Concessions							\$ -
19 Assessments / Services					\$ 177,178		\$ 177,178
20 Other Reciepts / Revenues ⁶	\$ 3,199,644	\$ 185,000	\$ 322,549		\$ 441,645		\$ 4,148,838
21 Subtotal:	\$ 522,764,128	\$ 39,188,486	\$ 129,682,924	\$ 218,164,796	\$ 534,435,293	\$ 2,917,787	\$ 1,447,153,414
22 Transfers In			\$ 24,193,627		\$ 41,499,305	\$ 955,753	\$ 66,648,685
23 Total - Receipts / Revenues:	\$ 522,764,128	\$ 39,188,486	\$ 153,876,551	\$ 218,164,796	\$ 575,934,598	\$ 3,873,540	\$ 1,513,802,099
24							
25 <u>Operating Expenditures</u>							
26 Salaries and Benefits	\$ 344,348,239	\$ 28,415,703	\$ 73,766,763	\$ 56,400,625	\$ 29,303,313	\$ 2,565,421	\$ 534,800,064
27 Other Personal Services							\$ -
28 Expenses	\$ 138,843,021	\$ 10,772,783	\$ 78,817,237	\$ 150,196,268	\$ 45,549,903	\$ 1,308,119	\$ 425,487,331
29 Operating Capital Outlay							\$ -
30 Risk Management	\$ 2,576,247						\$ 2,576,247
31 Financial Aid	\$ 31,796,621				\$ 499,874,164		\$ 531,670,785
32 Scholarships							\$ -
33 Waivers							\$ -
34 Finance Expense							\$ -
35 Debt Service					\$ 775,000		\$ 775,000
36 Salary Incentive Payments							\$ -
37 Law Enforcement Incentive Payments							\$ -
38 Library Resources	\$ 5,200,000						\$ 5,200,000

UNIVERSITY OF CENTRAL FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government							\$ -
40 Regional Data Centers - SUS							\$ -
41 Black Male Explorers Program							\$ -
42 Phosphate Research							\$ -
43 Other Operating Category							\$ -
44 Total Operating Expenditures :	<u>\$ 522,764,128</u>	<u>\$ 39,188,486</u>	<u>\$ 152,584,000</u>	<u>\$ 206,596,893</u>	<u>\$ 575,502,380</u>	<u>\$ 3,873,540</u>	<u>\$ 1,500,509,427</u>
45							
46 <u>Non-Operating Expenditures</u>							
47 Transfers							\$ -
48 Fixed Capital Outlay							\$ -
49 Carryforward (From Prior Period Funds)	\$ 56,264,853	\$ 2,426,123					\$ 58,690,976
50 Other ⁷							\$ -
51 Total Non-Operating Expenditures :	<u>\$ 56,264,853</u>	<u>\$ 2,426,123</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ -</u>	<u>\$ 58,690,976</u>
52							
53 Ending Fund Balance :	<u>\$ 84,649,479</u>	<u>\$ 14,745,868</u>	<u>\$ 35,440,224</u>	<u>\$ 187,445,877</u>	<u>\$ 47,656,682</u>	<u>\$ (7,556,219)</u>	<u>\$ 362,381,911</u>
54							
55 Fund Balance Increase / Decrease :	\$ (56,264,853)	\$ (2,426,123)	\$ 1,292,551	\$ 11,567,903	\$ 432,218	\$ -	\$ (45,398,304)
56 Fund Balance Percentage Change :	-39.93%	-14.13%	3.79%	6.58%	0.92%	0.00%	-11.13%

FLORIDA INTERNATIONAL UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 30,630,405	\$ 8,000,193	\$ 15,755,591	\$ 214,205,959	\$ 26,863,529	\$ 825,351	\$ 296,281,028
2							
3 <u>Receipts/Revenues</u>							
4 General Revenue	\$ 184,229,722	\$ 30,868,321					\$ 215,098,043
5 Lottery	\$ 30,665,057						\$ 30,665,057
6 Student Tuition	\$ 224,729,621	\$ 16,732,836		\$ 41,023,017	\$ 14,217,540		\$ 296,703,014
7 Phosphate Research							\$ -
8 Other U.S. Grants			\$ 65,580,811		\$ 86,136,145		\$ 151,716,956
9 City or County Grants			\$ 11,713,000				\$ 11,713,000
10 State Grants			\$ 86,293		\$ 21,724,237		\$ 21,810,530
11 Other Grants and Donations			\$ 9,843,000	\$ 6,110			\$ 9,849,110
12 Donations / Contrib. Given to the State							\$ -
13 Sales of Goods / Services			\$ 8,560,263	\$ 102,691,267	\$ 979,801	\$ 10,796,741	\$ 123,028,072
14 Sales of Data Processing Services							\$ -
15 Fees				\$ 15,700,884	\$ 62,482,899		\$ 78,183,783
16 Miscellaneous Receipts			\$ 18,528,028	\$ 14,826,711	\$ 12,169,061		\$ 45,523,800
17 Rent				\$ 25,165,634		\$ 340,818	\$ 25,506,452
18 Concessions					\$ 431,103		\$ 431,103
19 Assessments / Services							\$ -
20 Other Reciepts / Revenues ⁶				\$ 14,815,729	\$ 492,299		\$ 15,308,028
21 Subtotal:	\$ 439,624,400	\$ 47,601,157	\$ 114,311,395	\$ 214,229,352	\$ 198,633,085	\$ 11,137,559	\$ 1,025,536,948
22 Transfers In			\$ 24,005,756	\$ 55,519,738	\$ 40,302,972	\$ -	\$ 119,828,466
23 Total - Receipts / Revenues:	\$ 439,624,400	\$ 47,601,157	\$ 138,317,151	\$ 269,749,090	\$ 238,936,057	\$ 11,137,559	\$ 1,145,365,414
24							
25 <u>Operating Expenditures</u>							
26 Salaries and Benefits	\$ 287,135,726	\$ 36,733,357	\$ 55,695,742	\$ 68,159,802	\$ 16,170,152		\$ 463,894,779
27 Other Personal Services	\$ 29,352,318	\$ 1,804,253	\$ 14,575,914	\$ 17,412,495	\$ 3,205,447		\$ 66,350,427
28 Expenses	\$ 86,265,060	\$ 6,901,891	\$ 44,533,304	\$ 87,401,966	\$ 181,424,156	\$ 11,722,031	\$ 418,248,408
29 Operating Capital Outlay	\$ 3,764,643	\$ 312,515	\$ 1,932,838	\$ 3,463,565	\$ 2,025,000	\$ 112,365	\$ 11,610,926
30 Risk Management	\$ 1,895,507	\$ 34,877	\$ 232,535	\$ 417,603			\$ 2,580,522
31 Financial Aid	\$ 22,700,721						\$ 22,700,721
32 Scholarships				\$ 615,483			\$ 615,483
33 Waivers							\$ -
34 Finance Expense							\$ -
35 Debt Service				\$ 16,649,169			\$ 16,649,169
36 Salary Incentive Payments	\$ 36,000						\$ 36,000
37 Law Enforcement Incentive Payments							\$ -
38 Library Resources	\$ 8,474,425	\$ 682,469					\$ 9,156,894

FLORIDA INTERNATIONAL UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Medical School E&G¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government							\$ -
40 Regional Data Centers - SUS							\$ -
41 Black Male Explorers Program							\$ -
42 Phosphate Research							\$ -
43 Other Operating Category							\$ -
44 Total Operating Expenditures :	<u>\$ 439,624,400</u>	<u>\$ 46,469,362</u>	<u>\$ 116,970,333</u>	<u>\$ 194,120,083</u>	<u>\$ 202,824,755</u>	<u>\$ 11,834,396</u>	<u>\$ 1,011,843,329</u>
45							
46 <u>Non-Operating Expenditures</u>							
47 Transfers			\$ 22,683,129	\$ 73,324,268	\$ 37,858,471		\$ 133,865,868
48 Fixed Capital Outlay							\$ -
49 Carryforward (From Prior Period Funds)	\$ 6,083,195	\$ 5,620,135					\$ 11,703,330
50 Other ⁷							\$ -
51 Total Non-Operating Expenditures :	<u>\$ 6,083,195</u>	<u>\$ 5,620,135</u>	<u>\$ 22,683,129</u>	<u>\$ 73,324,268</u>	<u>\$ 37,858,471</u>	<u>\$ -</u>	<u>\$ 145,569,198</u>
52							
53 Ending Fund Balance :	<u>\$ 24,547,210</u>	<u>\$ 3,511,853</u>	<u>\$ 14,419,280</u>	<u>\$ 216,510,698</u>	<u>\$ 25,116,360</u>	<u>\$ 128,514</u>	<u>\$ 284,233,915</u>
54							
55 Fund Balance Increase / Decrease :	\$ (6,083,195)	\$ (4,488,340)	\$ (1,336,311)	\$ 2,304,739	\$ (1,747,169)	\$ (696,837)	\$ (12,047,113)
56 Fund Balance Percentage Change :	-19.86%	-56.10%	-8.48%	1.08%	-6.50%	-84.43%	-4.07%

UNIVERSITY OF NORTH FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 20,450,713	\$ 2,158,376	\$ 21,922,695	\$ 11,070,947	\$ -	\$ 55,602,731
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 78,516,639					\$ 78,516,639
5 Lottery	\$ 12,783,575					\$ 12,783,575
6 Student Tuition	\$ 66,764,129					\$ 66,764,129
7 Phosphate Research						\$ -
8 Other U.S. Grants		\$ 410,004		\$ 21,000,000		\$ 21,410,004
9 City or County Grants						\$ -
10 State Grants						\$ -
11 Other Grants and Donations		\$ 621,144		\$ 14,024,000		\$ 14,645,144
12 Donations / Contrib. Given to the State						\$ -
13 Sales of Goods / Services			\$ 48,500			\$ 48,500
14 Sales of Data Processing Services						\$ -
15 Fees		\$ 365,117	\$ 11,754,995	\$ 24,981,706		\$ 37,101,818
16 Miscellaneous Receipts		\$ 5,850,161	\$ 17,666,598	\$ 3,749,025		\$ 27,265,784
17 Rent			\$ 18,315,070			\$ 18,315,070
18 Concessions			\$ 34,000	\$ 60,000		\$ 94,000
19 Assessments / Services						\$ -
20 Other Reciepts / Revenues ⁶		\$ 30,070	\$ 619,056	\$ 152,309		\$ 801,435
21 Subtotal:	\$ 158,064,343	\$ 7,276,496	\$ 48,438,219	\$ 63,967,040	\$ -	\$ 277,746,098
22 Transfers In		\$ (222,832)	\$ 4,429,788	\$ 1,449,488		\$ 5,656,444
23 Total - Receipts / Revenues:	\$ 158,064,343	\$ 7,053,664	\$ 52,868,007	\$ 65,416,528	\$ -	\$ 283,402,542
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 115,102,636	\$ 3,431,766	\$ 12,712,996	\$ 10,070,860		\$ 141,318,258
27 Other Personal Services	\$ 5,658,855	\$ 1,080,258	\$ 2,708,557	\$ 3,525,752		\$ 12,973,422
28 Expenses	\$ 29,113,346	\$ 3,495,015	\$ 31,455,173	\$ 50,056,888		\$ 114,120,422
29 Operating Capital Outlay	\$ 69,071	\$ 472,960	\$ 377,290	\$ 16,500		\$ 935,821
30 Risk Management	\$ 1,193,458					\$ 1,193,458
31 Financial Aid	\$ 5,434,398			\$ 420,000		\$ 5,854,398
32 Scholarships						\$ -
33 Waivers						\$ -
34 Finance Expense						\$ -
35 Debt Service						\$ -
36 Salary Incentive Payments	\$ 30,000					\$ 30,000
37 Law Enforcement Incentive Payments						\$ -
38 Library Resources	\$ 1,462,579		\$ 6,200			\$ 1,468,779

UNIVERSITY OF NORTH FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government						\$ -
40 Regional Data Centers - SUS						\$ -
41 Black Male Explorers Program						\$ -
42 Phosphate Research						\$ -
43 Other Operating Category						\$ -
44 Total Operating Expenditures :	\$ 158,064,343	\$ 8,479,999	\$ 47,260,216	\$ 64,090,000	\$ -	\$ 277,894,558
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers		\$ 44,149	\$ 6,500,293	\$ 1,496,760		\$ 8,041,202
48 Fixed Capital Outlay						\$ -
49 Carryforward (From Prior Period Funds)	\$ 12,547,496					\$ 12,547,496
50 Other ⁷						\$ -
51 Total Non-Operating Expenditures :	\$ 12,547,496	\$ 44,149	\$ 6,500,293	\$ 1,496,760	\$ -	\$ 20,588,698
52						
53 Ending Fund Balance :	\$ 7,903,217	\$ 687,892	\$ 21,030,193	\$ 10,900,715	\$ -	\$ 40,522,017
54						
55 Fund Balance Increase / Decrease :	\$ (12,547,496)	\$ (1,470,484)	\$ (892,502)	\$ (170,232)	\$ -	\$ (15,080,714)
56 Fund Balance Percentage Change :	-61.35%	-68.13%	-4.07%	-1.54%	-	-27.12%

FLORIDA GULF COAST UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 15,352,760	\$ 4,797,626	\$ 14,451,852	\$ 3,558,772	\$ -	\$ 38,161,010
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 57,001,234					\$ 57,001,234
5 Lottery	\$ 7,193,122					\$ 7,193,122
6 Student Tuition	\$ 55,701,970					\$ 55,701,970
7 Phosphate Research						\$ -
8 Other U.S. Grants		\$ 7,934,679		\$ 25,392,058		\$ 33,326,737
9 City or County Grants		\$ 486,665				\$ 486,665
10 State Grants		\$ 1,659,477		\$ 186,471		\$ 1,845,948
11 Other Grants and Donations		\$ 3,650,060	\$ 14,000	\$ 1,129,489		\$ 4,793,549
12 Donations / Contrib. Given to the State						\$ -
13 Sales of Goods / Services						\$ -
14 Sales of Data Processing Services						\$ -
15 Fees			\$ 3,854,254	\$ 10,623,057		\$ 14,477,311
16 Miscellaneous Receipts		\$ 171,893	\$ 41,229,451	\$ 3,200,370		\$ 44,601,714
17 Rent						\$ -
18 Concessions						\$ -
19 Assessments / Services						\$ -
20 Other Reciepts / Revenues ⁶		\$ 67,023	\$ 330,000			\$ 397,023
21 Subtotal:	\$ 119,896,326	\$ 13,969,797	\$ 45,427,705	\$ 40,531,445	\$ -	\$ 219,825,273
22 Transfers In		\$ 3,671,899	\$ 4,132,967	\$ 667,000		\$ 8,471,866
23 Total - Receipts / Revenues:	\$ 119,896,326	\$ 17,641,696	\$ 49,560,672	\$ 41,198,445	\$ -	\$ 228,297,139
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 85,032,405	\$ 6,310,162	\$ 9,823,464	\$ 6,315,202		\$ 107,481,233
27 Other Personal Services	\$ 8,820,344	\$ 1,841,486	\$ 2,358,716	\$ 2,356,332		\$ 15,376,878
28 Expenses	\$ 19,758,690	\$ 6,377,024	\$ 14,880,887	\$ 5,193,262		\$ 46,209,863
29 Operating Capital Outlay	\$ 499,630	\$ 328,124	\$ 528,910	\$ 116,500		\$ 1,473,164
30 Risk Management	\$ 1,158,238		\$ 136,350			\$ 1,294,588
31 Financial Aid	\$ 3,060,363	\$ 500,343	\$ 27,182	\$ 25,077,058		\$ 28,664,946
32 Scholarships						\$ -
33 Waivers						\$ -
34 Finance Expense				\$ 1,550,487		\$ 1,550,487
35 Debt Service						\$ -
36 Salary Incentive Payments						\$ -
37 Law Enforcement Incentive Payments						\$ -
38 Library Resources	\$ 1,566,656					\$ 1,566,656

FLORIDA GULF COAST UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government						\$ -
40 Regional Data Centers - SUS						\$ -
41 Black Male Explorers Program						\$ -
42 Phosphate Research						\$ -
43 Other Operating Category						\$ -
44 Total Operating Expenditures :	<u>\$ 119,896,326</u>	<u>\$ 15,357,139</u>	<u>\$ 27,755,509</u>	<u>\$ 40,608,841</u>	<u>\$ -</u>	<u>\$ 203,617,815</u>
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers		\$ 36,909	\$ 3,840,144	\$ 374,579		\$ 4,251,632
48 Fixed Capital Outlay						\$ -
49 Carryforward (From Prior Period Funds)						\$ -
50 Other ⁷						\$ -
51 Total Non-Operating Expenditures :	<u>\$ -</u>	<u>\$ 36,909</u>	<u>\$ 3,840,144</u>	<u>\$ 374,579</u>	<u>\$ -</u>	<u>\$ 4,251,632</u>
52						
53 Ending Fund Balance :	<u>\$ 15,352,760</u>	<u>\$ 7,045,274</u>	<u>\$ 32,416,871</u>	<u>\$ 3,773,797</u>	<u>\$ -</u>	<u>\$ 58,588,702</u>
54						
55 Fund Balance Increase / Decrease :	\$ -	\$ 2,247,648	\$ 17,965,019	\$ 215,025	\$ -	\$ 20,427,692
56 Fund Balance Percentage Change :	0.00%	46.85%	124.31%	6.04%	-	53.53%

NEW COLLEGE OF FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 1,865,723	\$ 584,375	\$ 4,372,831	\$ 229,107	\$ -	\$ 7,052,036
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 17,385,645					\$ 17,385,645
5 Lottery	\$ 1,104,243					\$ 1,104,243
6 Student Tuition	\$ 4,781,945					\$ 4,781,945
7 Phosphate Research						\$ -
8 Other U.S. Grants		\$ 60,000				\$ 60,000
9 City or County Grants						\$ -
10 State Grants						\$ -
11 Other Grants and Donations		\$ 565,851		\$ 3,585,698		\$ 4,151,549
12 Donations / Contrib. Given to the State						\$ -
13 Sales of Goods / Services						\$ -
14 Sales of Data Processing Services						\$ -
15 Fees			\$ 666,802	\$ 856,346		\$ 1,523,148
16 Miscellaneous Receipts		\$ 1,744,374	\$ 5,934,927	\$ 5,000		\$ 7,684,301
17 Rent		\$ -				\$ -
18 Concessions						\$ -
19 Assessments / Services						\$ -
20 Other Reciepts / Revenues ⁶	\$ 50,000	\$ 3,000	\$ 36,100	\$ 3,000		\$ 92,100
21 Subtotal:	\$ 23,321,833	\$ 2,373,225	\$ 6,637,829	\$ 4,450,044	\$ -	\$ 36,782,931
22 Transfers In			\$ 1,347,380	\$ -		\$ 1,347,380
23 Total - Receipts / Revenues:	\$ 23,321,833	\$ 2,373,225	\$ 7,985,209	\$ 4,450,044	\$ -	\$ 38,130,311
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 17,130,066	\$ 1,652,275	\$ 1,226,606	\$ 250,428		\$ 20,259,375
27 Other Personal Services	\$ 601,679	\$ 527,350	\$ 284,798	\$ 105,520		\$ 1,519,347
28 Expenses	\$ 3,838,317	\$ 193,600	\$ 3,732,434	\$ 323,726		\$ 8,088,077
29 Operating Capital Outlay		\$ -	\$ 500,000			\$ 500,000
30 Risk Management	\$ 290,221		\$ 23,444			\$ 313,665
31 Financial Aid	\$ 438,096			\$ 1,403,632		\$ 1,841,728
32 Scholarships	\$ 791,789			\$ 2,399,129		\$ 3,190,918
33 Waivers						\$ -
34 Finance Expense						\$ -
35 Debt Service			\$ 2,016,000			\$ 2,016,000
36 Salary Incentive Payments						\$ -
37 Law Enforcement Incentive Payments						\$ -
38 Library Resources	\$ 181,665					\$ 181,665

NEW COLLEGE OF FLORIDA
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government						\$ -
40 Regional Data Centers - SUS						\$ -
41 Black Male Explorers Program						\$ -
42 Phosphate Research						\$ -
43 Other Operating Category						\$ -
44 Total Operating Expenditures :	\$ 23,271,833	\$ 2,373,225	\$ 7,783,282	\$ 4,482,435	\$ -	\$ 37,910,775
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers			\$ 1,347,380			\$ 1,347,380
48 Fixed Capital Outlay						\$ -
49 Carryforward (From Prior Period Funds)	\$ 686,926					\$ 686,926
50 Other ⁷	\$ 50,000					\$ 50,000
51 Total Non-Operating Expenditures :	\$ 736,926	\$ -	\$ 1,347,380	\$ -	\$ -	\$ 2,084,306
52						
53 Ending Fund Balance :	\$ 1,178,797	\$ 584,375	\$ 3,227,378	\$ 196,716	\$ -	\$ 5,187,266
54						
55 Fund Balance Increase / Decrease :	\$ (686,926)	\$ -	\$ (1,145,453)	\$ (32,391)	\$ -	\$ (1,864,770)
56 Fund Balance Percentage Change :	-36.82%	0.00%	-26.19%	-14.14%	-	-26.44%

FLORIDA POLYTECHNIC UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
1 Beginning Fund Balance	\$ 24,182,239	\$ -	\$ 663,061	\$ -	\$ -	\$ 24,845,300
2						
3 <u>Receipts/Revenues</u>						
4 General Revenue	\$ 30,269,297					\$ 30,269,297
5 Lottery	\$ 456,560					\$ 456,560
6 Student Tuition	\$ 1,282,449					\$ 1,282,449
7 Phosphate Research	\$ 2,160,000					\$ 2,160,000
8 Other U.S. Grants						\$ -
9 City or County Grants						\$ -
10 State Grants						\$ -
11 Other Grants and Donations		\$ 400,000				\$ 400,000
12 Donations / Contrib. Given to the State						\$ -
13 Sales of Goods / Services			\$ 2,061,718			\$ 2,061,718
14 Sales of Data Processing Services						\$ -
15 Fees			\$ 141,056	\$ 637,720		\$ 778,776
16 Miscellaneous Receipts						\$ -
17 Rent						\$ -
18 Concessions				\$ 25,000		\$ 25,000
19 Assessments / Services						\$ -
20 Other Reciepts / Revenues ⁶						\$ -
21 Subtotal:	\$ 34,168,306	\$ 400,000	\$ 2,202,774	\$ 662,720	\$ -	\$ 37,433,800
22 Transfers In		\$ 330,000		\$ 1,500,000		\$ 1,830,000
23 Total - Receipts / Revenues:	\$ 34,168,306	\$ 730,000	\$ 2,202,774	\$ 2,162,720	\$ -	\$ 39,263,800
24						
25 <u>Operating Expenditures</u>						
26 Salaries and Benefits	\$ 10,900,002	\$ 330,000	\$ 243,438	\$ 50,000		\$ 11,523,440
27 Other Personal Services	\$ 170,051		\$ 63,500	\$ 50,000		\$ 283,551
28 Expenses	\$ 20,088,253	\$ 400,000	\$ 1,136,081	\$ 2,007,720		\$ 23,632,054
29 Operating Capital Outlay	\$ 780,000		\$ 417,940	\$ 55,000		\$ 1,252,940
30 Risk Management	\$ 20,000					\$ 20,000
31 Financial Aid	\$ 50,000					\$ 50,000
32 Scholarships						\$ -
33 Waivers						\$ -
34 Finance Expense						\$ -
35 Debt Service						\$ -
36 Salary Incentive Payments						\$ -
37 Law Enforcement Incentive Payments						\$ -
38 Library Resources						\$ -

FLORIDA POLYTECHNIC UNIVERSITY
2014-2015 Operating Budget
Summary Schedule I

	<u>Education & General¹</u>	<u>Contracts & Grants²</u>	<u>Auxiliaries³</u>	<u>Local Funds⁴</u>	<u>Faculty Practice⁵</u>	<u>Summary</u>
39 Institute of Government						\$ -
40 Regional Data Centers - SUS						\$ -
41 Black Male Explorers Program						\$ -
42 Phosphate Research	\$ 2,160,000					\$ 2,160,000
43 Other Operating Category						\$ -
44 Total Operating Expenditures :	\$ 34,168,306	\$ 730,000	\$ 1,860,959	\$ 2,162,720	\$ -	\$ 38,921,985
45						
46 <u>Non-Operating Expenditures</u>						
47 Transfers						\$ -
48 Fixed Capital Outlay						\$ -
49 Carryforward (From Prior Period Funds	\$ 14,641,137					\$ 14,641,137
50 Other ⁷	\$ 1,240,000					\$ 1,240,000
51 Total Non-Operating Expenditures :	\$ 15,881,137	\$ -	\$ -	\$ -	\$ -	\$ 15,881,137
52						
53 Ending Fund Balance :	\$ 8,301,102	\$ -	\$ 1,004,876	\$ -	\$ -	\$ 9,305,978
54						
55 Fund Balance Increase / Decrease :	\$ (15,881,137)	\$ -	\$ 341,815	\$ -	\$ -	\$ (15,539,322)
56 Fund Balance Percentage Change :	-65.67%	-	51.55%	-	-	-62.54%

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: 2014-2015 Board General Office Budget

PROPOSED COMMITTEE ACTION

Approve the 2014-2015 Board General Office Budget and authorize the Chancellor to make changes as necessary to support office functions.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution; 2014 General Appropriations Act

BACKGROUND INFORMATION

The Board General Office budget for 2014-2015 totals \$8.2 million and supports 63 authorized positions. The 2014 General Appropriations Act allocates funds by specific category and funding source as follows:

Appropriation Category	Appropriation
Salaries & Benefits - GR	\$5,599,582
Salaries & Benefits - Trust Funds	\$695,351
Other Personal Services - GR	\$51,310
Other Personal Services - Trust Funds	\$20,785
Expenses - GR	\$737,967
Expenses - Trust Funds	\$271,799
Operating Capital Outlay - GR	\$11,782
Operating Capital Outlay - Trust Funds	\$5,950
Contracted Services - GR	\$740,127
Contracted Services - Trust Funds	\$23,000
Risk Management Insurance	\$10,585
DMS - HR Services - GR	\$17,295
DMS - HR Services - Trust Funds	\$2,206

Data Processing Services - GR	\$21,562

Each funding source and category has specific restrictions on spending funds from that appropriation. Appropriations are allowed to be transferred between categories via budget transfers filed with the Governor's Office. These transfers cannot exceed five percent or \$250,000 whichever is greater. Any transfers in excess of this amount must be approved by the Legislature and Governor through an established budget amendment process.

Appropriation Funding Source:

- General Revenue – appropriations from this source has the least restrictions and can be used for any basic operating expense.
- Trust Funds – appropriations from this source are primarily used to support Board Facility Office staff and expenses.

Appropriation Category:

- Salaries & Benefits – salaries and benefits associated with 57 authorized positions.
- Other Personal Services – these funds are utilized for temporary employment. The Board utilizes university students to supplement basic phone coverage and other office needs.
- Expenses – these funds are utilized for basic operating expenses such as travel, rent, office supplies, or equipment costing less than \$1,000.
- Operating Capital Outlay – these funds are utilized for items costing more than \$1,000, such as computers or furniture.
- Contracted Services – these funds are utilized for any service requiring a contractual agreement.
- Risk Management Insurance – these funds are transferred to the Department of Management Services to cover the costs associated with the State's risk management pool.
- DMS – HR Services – these funds are transferred to the Department of Management Services to cover the costs associated with the State's PeopleFirst System.
- Data Processing Services – these funds are transferred to the Northwest Regional Data Center to pay for data storage services.

Supporting Documentation Included: Board General Office Operating Budget Summary for Fiscal Year 2014-2015

Facilitators/Presenters: Tim Jones

Board of Governors
2014-2015 General Office Budget
Total (General Revenue & Trust Funds)

	Salaries & Benefits	Other Personal Services	Expenses	Operating Capital Outlay	Contracted Services	*Northwest Regional Data Center	DMS - PeopleFirst	Risk Management Insurance	Total
Beginning Appropriation as of 7/1/14	\$6,294,933	\$72,095	\$1,009,766	\$17,732	\$763,127	\$21,562	\$19,501	\$10,585	\$8,209,301
Transfers Between Categories	(\$50,000)	\$0	(\$7,489)	\$0	\$50,000	\$7,489	\$0	\$0	\$0
Adjusted Appropriation	\$6,244,933	\$72,095	\$1,002,277	\$17,732	\$813,127	\$29,051	\$19,501	\$10,585	\$8,209,301
Obligations:									
1 63 Authorized Positions	(\$5,642,559)								(\$5,642,559)
2 Tempoary Employees (Student Assistance)		(\$55,530)							(\$55,530)
3 Tnsfr to DMS for Rent - Turlington Building			(\$273,205)						(\$273,205)
4 Tnsfr to DMS for HR PeopleFirst Services							(\$19,501)		(\$19,501)
5 Tnsfr to DMS for Risk Management Insurance								(\$10,585)	(\$10,585)
6 Tnsfr to NWRDC* for IT Services						(\$29,051)			(\$29,051)
7 Advertising, IT Service, Copier Maintenance					(\$61,353)				(\$61,353)
8 Contract for STEM Advisor					(\$50,000)				(\$50,000)
9 Communication & DOE Support Services			(\$33,590)						(\$33,590)
10 Printing			(\$8,100)						(\$8,100)
11 Travel & Training (Bd Members & Staff (Ed. Plant Surveys))			(\$454,107)						(\$454,107)
12 Office Supplies			(\$13,055)						(\$13,055)
13 Information Technology Supplies & Software			(\$19,500)						(\$19,500)
14 Information Technology Maintenance					(\$15,367)				(\$15,367)
15 Property & Crime Insurances			(\$386)						(\$386)
16 Memberships/Dues/Subscriptions			(\$80,120)						(\$80,120)
17 Equipment & Furniture Replacement				(\$17,732)					(\$17,732)
18 Renovation of Budget & Finance Offices			(\$10,891)		(\$50,000)				(\$60,891)
19 FAMU/FSU College of Engineering Feasibility Study					(\$500,000)				(\$500,000)
20 Contingency (including lapse from unfilled positions)	(\$602,374)	(\$16,565)	(\$109,323)		(\$136,407)				(\$864,669)
Total Expenditures	(\$6,244,933)	(\$72,095)	(\$1,002,277)	(\$17,732)	(\$813,127)	(\$29,051)	(\$19,501)	(\$10,585)	(\$8,209,301)
Appropriation Balance	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

*Northwest Regional Data Center

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: 2015-2016 State University System Legislative Budget Request

PROPOSED COMMITTEE ACTION

Approve the 2015-2016 operating Legislative Budget Request for the State University System and allow the Chancellor to make technical changes as necessary.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution; Section 216.023 Florida Statute

BACKGROUND INFORMATION

Annually, the Board of Governors must prepare and submit a State University System Legislative Budget Request (LBR) for state appropriated operating funds to the Legislature and Governor by October 15. The budget must be reviewed and recommendations made on the issues to be included in the 2015-2016 LBR. In accordance with Subsection 216.023(1), Florida Statutes, this LBR is based on an independent judgment of needs and pursuant to the LBR instructions will be presented to the Legislature and Governor by the statutory due date.

State University System (SUS):

A 5.0% increase is requested for the State University System. This request consists of 3 major components:

- a. Performance Funding of \$100 million in new funds, plus \$200 million in base funds. These funds will be allocated based on the Board's 10-metric performance funding model.
- b. Workload/Pass-through Initiatives - \$23.8 million. This includes funding for plant operations and maintenance for new and existing facilities, UF-IFAS workload, and pass-through funds for the Moffitt Cancer Center and the Institute of Human and Machine Cognition (IHMC).
- c. Research/System Initiatives - \$32.6 million. This includes potential funding for various initiatives that will be discussed in the Academic and

Student Affairs or Innovation and Online Committee. In addition, the Budget and Finance Committee will consider three initiatives: Safety Enhancements for NCF and USF-Sarasota-Manatee, Shared Initiatives and the Johnson Matching Gift Program.

Detail on each of these initiatives can be found in the supporting materials.

Information is also provided on three unique university collaborations that will be further discussed by the Council for Academic Vice Presidents and possibly presented at a future Academic and Student Affairs Committee.

The Major Gift Matching program has an unmatched balance of \$285 million and was suspended by the Legislature several years ago. Universities have provided information on various initiatives for which they would like to request potential funding. These initiatives are provided for informational purposes.

In addition, each university has provided information on the following areas:

1. Performance Funding – each university has provided an overview of the initiatives they are undertaking based on the performance funds received this year.
2. Efficiencies - each university has provided a summary of various efficiency initiatives that have taken place or are underway.
3. Five Percent Reductions - The detailed budget instructions provided by the Legislature and Governor’s Office requested each agency, including universities, to provide information on the impact of a five percent budget reduction (which is a standard, annual request made by the Legislature and Governor).

The Chancellor recommends approval of the SUS LBR and requests authority to make technical changes as necessary.

Supporting Documentation Included:	<ul style="list-style-type: none"> 1. 2015-16 LBR Guidelines 2. SUS Executive Budget Summary 3. Summary Budget Narratives 4. Moffitt Cancer Center & IHMC Narratives 5. Other University Collaborations 6. Major Gift Matching and Other University Initiatives 7. 2014-2015 Performance Funding Initiatives 8. University Efficiencies 9. Five Percent Reduction Proposals
---	--

Facilitators/Presenters:	Tim Jones
---------------------------------	-----------



State University System of Florida Board of Governors 2015-16 Legislative Budget Request Development Policy Guidelines

Pursuant to Section 7, Article 9 of the Florida Constitution, the Board "...shall operate, regulate, control, and be fully responsible for the management of the whole university system." Included within this responsibility is the development of a Legislative Budget Request (LBR). In addition, Section 216.023(1), Florida Statutes, requires the submission of an LBR to the Legislature and Governor based on an independent judgment of needs.

The 2015-2016 LBR will provide flexibility for the Board of Governors (Board) and individual university boards of trustees to jointly manage the system to meet the critical needs of the state, achieve the statewide goals and objectives of the updated State University System (SUS) Strategic Plan and university work plans, and demonstrate accountability/justification. The following goals of the SUS Strategic Plan will be addressed in the request:

1. Excellence
2. Productivity
3. Strategic Priorities for a Knowledge Economy

These System goals, as well as institutional goals and initiatives, should be incorporated into the following priorities, which will be reflected in the LBR:

Operating and Specialized Program Funds:

1. Continuing costs associated with existing programs – This policy addresses the funds needed to continue existing programs:
 - a) Plant operations and maintenance for new and existing buildings –
 - i. Funds will be requested for the annualized operations and maintenance costs for buildings completed and phased-in during 2014-2015;
 - ii. Funds will be requested for the operating costs for new buildings to be completed and occupied in 2015-2016.
 - iii. Funds will be requested for the increased utilities and operating costs of existing buildings.

Approved June 19, 2014

1



2. Performance Funding – Funding will be requested based on a performance funding model as agreed upon by the Board, Legislature and Governor.
3. Task Force Reports and Studies – Consideration will be given to initiatives recommended in any task force reports or studies and endorsed by the Board.
4. Shared System Resources – Consideration will be given to initiatives that allow for greater efficiencies through shared system resources.
5. If a university received non-recurring funds for an initiative and that initiative is a priority for continued funding, then the university should submit that issue for consideration by the Board. System non-recurring funds received for base budget operations will be considered for the LBR.

The following represents the timeline for submission of the SUS 2015-2016 LBR for operations:

- June: Board approves the LBR Policy Guidelines.
- July – Aug: Chancellor works with universities to develop any system and university LBR issues.
- September: Board approves the operating LBR.
- October: Operating LBR is submitted to the Governor and Legislature.
- January: If necessary, potential amendments will be considered.

Fixed Capital Outlay Funds:

The university's approved Five Year Capital Improvement Plan (CIP) will be prioritized, in the first year, as indicated below. Please note that PECO funding to meet critical maintenance needs has been assigned a higher priority than adding new facilities, with the intent to improve the condition of existing space and campus infrastructure. Written justification, noting any exceptions to the priorities provided by the guidelines, and explaining why a priority exception is in the best interest of the university should be included in the cover letter submitted with the CIP package. This will assist Board staff in comparative evaluation of university projects, and justification in terms of relative system ranking for placing in system priority order. Each university should submit one and only one prioritized, sequentially numbered list.



Funding will be requested for institutional survey recommended PECO projects in the following priority order¹:

A. Maintenance Projects

- a. Funding for Remodeling/Renovation/Maintenance/Repair will be requested from PECO pursuant to formula as required by Section 1013.64(1)(a), Florida Statutes.
- b. Critical Deferred Maintenance

B. System and Continuation Projects

- a. Projects funded by the legislature in the amount and in the year as last included on the Board adopted three year list.
- b. Projects funded by the Legislature, but not on the Board adopted three year list.
- c. Projects that require additional funding to complete.

C. Renovation Projects

- a. Utilities/infrastructure/capital renewal/roofs needs.
- b. Renovation and remodeling projects to meet current space needs, structural/mechanical repairs, replacement of existing facilities which have a survey recommendation.

D. Strategic Projects

- a. Land or building acquisition in accordance with university board of trustees adopted master plans.
- b. New facilities, as needed to meet instructional and support space needs.

E. Legislative Authorizations

- a. Required legislative authorizations will be requested for externally funded projects as proposed by the universities, in accordance with Section 1010.62 and 1013.78, Florida Statutes.

¹ Each university must incorporate utilization data as a factor in prioritization of university CIP funding requests to the Board. Programs with classroom and teaching lab space utilization below the current SUS standard will not be eligible for inclusion on the university CIP. General purpose classroom or teaching lab space (space not designated for a specific academic program or discipline) will not be eligible for inclusion if utilization was below the SUS standard for 2013-14. This standard applies both to the university as a whole and on a site-specific basis.



The following represents the timeline for submission of the SUS 2015-16 Fixed Capital Outlay LBR:

- May Chancellor provides draft technical instructions and requests universities to submit their five-year CIPs.
- June Board approves the LBR Policy Guidelines.
- August: Universities submit five-year CIPs. Board staff will review CIPs with university designee(s), technical corrections will be made as required.
- September: Board approves the fixed capital outlay (FCO) LBR.
- October: Fixed capital outlay LBR is submitted to the Governor and Legislature.
- October Board Facilities Workshop. The Board will meet with university trustees and university staff to review projects, including at a minimum all those approved in the initial September LBR.
- December: Universities submit amended FCO requests to Board as needed.
- January: Board approves amended LBR.

State University System of Florida
Education and General
Executive Summary, Universities and Special Units
FY 2015-2016

	SUS
1 2014-2015 Total Appropriations	
2 State Support	\$2,493,603,923
3 Tuition Support	\$1,861,209,106
4 2014-2015 Total Base Budget	\$4,354,813,029
5 2014-2015 Start-up Budget	
6 Annualization of 2014-2015 Plant, Operations, and Maintenance	\$1,121,816
7 Annualization of Fall 2014 Base Tuition	\$8,750,208
8 Non-Recurring Appropriations, 2014-2015	(\$47,316,210)
9 2014-2015 Beginning Base Budget	\$4,317,368,843
11 2015-2016 Budget Issues:	
12 Technical Adjustments	
13 Estimated Tuition Authority	\$60,000,000
14 Performance Funding Initiative	
15 SUS Performance Based Incentives (new funds)	\$100,000,000
16 Reduction of Base Funding from 2014-2015 Appropriation	(\$200,000,000)
17 Reallocation of Base Funding to Performance Funding Initiative	\$200,000,000
18 System Workload/Pass-Through Initiatives	
19 Plant, Operations, and Maintenance for 2015-16 New Facilities	\$6,311,188
20 UF-IFAS Workload Initiative	\$5,500,000
21 Moffitt Cancer Center (<i>pass-through funds</i>)	\$8,500,000
22 Institute of Human and Machine Cognition (<i>pass-through funds</i>)	\$3,489,184
23 Research/System Initiatives	
24 Shared System Resources - Art Program (FSU, NCF) - Academic and Student Affairs	\$483,840
25 Gap Analysis - TEAm Initiative - Academic and Student Affairs	\$15,000,000
26 Faculty Development Initiative - Innovation and Online	\$198,008
27 Student-Centered Online Services Environment - Innovation and Online	\$2,203,000
28 Integrated Library System - Innovation and Online	\$4,550,000
29 e-Resources for STEM - Innovation and Online	\$2,250,000
30 Academic Shared Services (Press of Florida, Florida Academic Repository, E-Journals) - Innovation and Online	\$3,502,872
31 Safety and Security Enhancement Efforts (NCF, USF-Sar/Man)	\$720,524
32 Shared Initiative - Reduction Adjustment	(\$10,000,000)
33 Shared Initiative - Reallocate Adjustment	\$12,000,000
34 Johnson Matching Gift Program	\$1,772,500
35 Incremental Growth for 2015-2016	\$216,481,116
37 Total 2015-2016 Budget	\$4,533,849,959
38 % Increase over 2014-2015 Beginning Base Budget (Line 9)	5.0%
39 2014-2015 Beginning State Support	\$2,447,409,529
40 Change in State Support	\$156,481,116
41 Total State Support Needed for FY 2015-2016	\$2,603,890,645
43 2014-2015 Beginning Student Tuition Support	\$1,869,959,314
44 Change in Tuition Support	\$60,000,000
45 Total Tuition Support Needed for FY 2015-2016	\$1,929,959,314
46 Total Support for FY 2015-2016	\$4,533,849,959

State University System of Florida
Education and General Core Budget
Executive Summary, Universities
FY 2015-2016

	SUS
1 2014-2015 Total Appropriations	
2 State Support	\$2,033,205,967
3 Tuition Support	\$1,717,093,656
4 2014-2015 Total Base Budget	\$3,750,299,623
5 2014-2015 Start-up Budget	
6 Annualization of 2014-2015 Plant, Operations, and Maintenance	\$1,121,816
7 Annualization of Fall 2014 Base Tuition	\$8,496,147
8 Non-Recurring Appropriations, 2014-2015	(\$36,480,332)
9 2014-2015 Beginning Base Budget	\$3,723,437,254
10	
11 2015-2016 Budget Issues:	
12 Technical Adjustments	
13 Estimated Tuition Authority	\$51,127,202
14 Performance Funding Initiative	
15 State University System Performance Based Incentives (new funds)	\$100,000,000
16 Reduction of Base Funding from 2014-2015 Appropriation	(\$200,000,000)
17 Reallocation of Base Funding to Performance Funding Initiative	\$200,000,000
18 System Workload Initiatives	
19 Plant, Operations, and Maintenance for 2015-16 New Facilities	\$5,628,544
20 Research/System Initiatives	
21 Shared System Resources - Art Program (FSU, NCF) - Academic and Student Affairs	\$483,840
22 Gap Analysis - TEAm Initiative - Academic and Student Affairs	\$15,000,000
23 Faculty Development Initiative - Innovation and Online	\$198,008
24 Student-Centered Online Services Environment - Innovation and Online	\$2,203,000
25 Integrated Library System - Innovation and Online	\$4,550,000
26 e-Resources for STEM - Innovation and Online	\$2,250,000
27 Academic Shared Services (Press of Florida, Florida Academic Repository, E-Journals) - Innovation and Online	\$3,502,872
28 Safety and Security Enhancement Efforts (NCF, USF-Sar/Man)	\$720,524
29 Shared Initiative - Reduction Adjustment	(\$10,000,000)
30 Shared Initiative - Reallocate Adjustment	\$12,000,000
31 Incremental Growth for 2015-2016	\$187,663,990
32	
33 Total 2015-2016 Budget	\$3,911,101,244
34 % Increase over 2014-2015 Beginning Base Budget (Line 9)	5.0%
35 2014-2015 Beginning State Support	\$1,997,847,451
36 Change in State Support	\$136,536,788
37 Total State Support Needed for FY 2015-2016	\$2,134,384,239
38	
39 2014-2015 Beginning Student Tuition Support	\$1,725,589,803
40 Change in Tuition Support	\$51,127,202
41 Total Tuition Support Needed for FY 2015-2016	\$1,776,717,005
42 Total Support for FY 2015-2016	\$3,911,101,244

**State University System
2015-2016 Budget
Special Units and State Initiatives**

	UF-IFAS	UF-HSC	USF-HSC	FSU-MS	FIU-MS	UCF-MS	FAU-MS	Johnson Matching Program	Moffitt	IHMC	Total
2014-2015 Appropriation											
State Support	\$153,006,339	\$110,688,435	\$74,656,899	\$35,009,382	\$30,868,321	\$25,757,576	\$14,344,890		\$12,576,930	\$3,489,184	\$460,397,956
Tuition Support		\$38,463,434	\$56,731,164	\$11,572,716	\$15,601,041	\$13,508,590	\$8,238,505				\$144,115,450
Sub-total	\$153,006,339	\$149,151,869	\$131,388,063	\$46,582,098	\$46,469,362	\$39,266,166	\$22,583,395		\$12,576,930	\$3,489,184	\$604,513,406
2014-2015 Start-up Budget											
Non-recurring Appropriations, 2014-2015	(\$5,985,878)		(\$2,100,000)						(\$2,000,000)	(\$750,000)	(\$10,835,878)
Annualization of Fall 2012 Base Tuition			\$254,061								\$254,061
2014-2015 Beginning Base Budget	\$147,020,461	\$149,151,869	\$129,542,124	\$46,582,098	\$46,469,362	\$39,266,166	\$22,583,395		\$10,576,930	\$2,739,184	\$593,931,589
2015-2016 Budget Issues											
Technical Adjustments											
Estimated Tuition Authority			\$1,541,203		\$3,068,070	\$2,183,300	\$2,080,225				\$8,872,798
System Workload Initiatives											
PO&M for 2015-2016 New Facilities*	\$275,813	\$406,831									\$682,644
UF-IFAS Workload Initiative	\$5,500,000										\$5,500,000
Research/ System Initiatives											
Johnson Major Gift Program								\$1,772,500			\$1,772,500
Moffitt									\$8,500,000		\$8,500,000
IHMC										\$3,489,184	\$3,489,184
Total Incremental Increase	\$5,775,813	\$406,831	\$1,541,203	\$0	\$3,068,070	\$2,183,300	\$2,080,225	\$1,772,500	\$8,500,000	\$3,489,184	\$28,817,126
Total 2015-2016 Budget	\$152,796,274	\$149,558,700	\$131,083,327	\$46,582,098	\$49,537,432	\$41,449,466	\$24,663,620	\$1,772,500	\$19,076,930	\$6,228,368	\$622,748,715
State Support	\$152,796,274	\$111,095,266	\$72,810,960	\$35,009,382	\$30,868,321	\$25,757,576	\$14,344,890	\$1,772,500	\$19,076,930	\$6,228,368	\$469,760,467
Tuition Support		\$38,463,434	\$58,272,367	\$11,572,716	\$18,669,111	\$15,691,890	\$10,318,730				\$152,988,248
% Increase over 2014-2015 Approp (Line 9)	3.9%	0.3%	1.2%	0.0%	6.6%	5.6%	9.2%		80.4%	100+%	4.9%

*Plant Operations & Maintenance



State University System Education & General 2015-2016 Legislative Budget Request Issues

The following provides a brief explanation of the major issues recommended for inclusion in the 2015-2016 Legislative Budget Request (LBR). More detailed information is available in the Board Office.

1. Estimated Tuition Authority – \$60 M

- A total of \$60 million in tuition is expected to be generated by the system based on the 2015-2016 estimated enrollment figures reported by the universities in their 2014 University Work Plans. Total estimated increase of 5,028 full-time equivalent (FTE) students brings the system total to 230,029 FTE. Additionally, the estimated authority includes the change-in-mix between in-state and out-of-state students at the undergraduate and graduate levels and the estimated tuition expected from the medical schools.

2. State University System Performance Based Incentives (new funds) – \$100 M

- The Performance Funding Model includes 10 metrics that evaluate the institutions on a range of issues and is guided by four guiding principles: 1) use metrics that align with SUS Strategic Plan goals; 2) reward Excellence or Improvement, 3) have a few clear, simple metrics, and 4) acknowledge the unique mission of the different institutions.

For FY 2014-2015, the Legislature appropriated \$100 million in general revenue funds to the system. The \$100 million in new funds was matched by an equal amount reallocated from the education and general base budget and other system initiatives.

For FY 2015-2016, the following key components of the model would remain in existence as a proposal for \$100 million in new funds is presented to the Legislature for the upcoming year:

2015-2016 LBR

- Institutions would be evaluated on either Excellence or Improvement for each metric;
- Data would be based on one-year of information; and
- The benchmarks for Excellence would be based on the Board of Governors 2025 System Strategic Plan goals and analysis of relevant data trends, whereas the benchmarks for Improvement would be determined after reviewing data trends for each metric.

3. Reduction and Reallocation of Base Funding - (-/+ \$200 M)

- A prorated amount totaling \$200 million in state appropriations would be reduced from each university's recurring base. A university earning more than 25 points would have their base funding restored and a university scoring 25 points or less would have to submit an improvement plan to the Board of Governors and demonstrate progress towards the plan in order for base funding to be restored.

4. Plant, Operations, and Maintenance for 2015-2016 New Facilities - \$6 M

- During FY 2015-2016, the system expects to increase its E&G facilities inventory by over 30 facilities totaling an estimated 673,161 gross square feet. New facilities completed based on the contract substantial completion date and approved for construction or acquisition by the Legislature are included in this request.

Of the total amount, approximately \$275,813 and \$406,831 is requested for UF-IFAS and UF-HSC.

5. University of Florida - Institute of Food and Agricultural Sciences (IFAS) - \$5.5 M

- The Board of Governors asked IFAS to develop a cost to continue funding formula or model that would respond to increased research and extension workload demands. The workload funding supports goal 37 of UF's Strategic Workplan which is to strengthen the IFAS statewide network of extension, research and academic programs and to provide science-based solutions to Florida's citizens.

As Florida's population rises, the costs of delivering science-based extension information are steadily increasing. Public demand for research and extension programs continues to change and expand as new forces shape and reshape Florida's food and natural resource industries (agriculture, forestry, recreational fishing, aquaculture, landscape management, horticulture and nutritional/health, etc.) The IFAS research

2015-2016 LBR

and extension budget is unique within the State University System in that it is mission driven based upon clientele and stakeholder needs. It is also the only SUS entity that does not have an annual workload demand formula similar to enrollment increases.

Return on Investment

- According to the United States Department of Agriculture, every dollar invested in U.S. agricultural research returns \$10 in benefits from increased productivity by agricultural producers and lower prices for consumers. The Extension service ensures that the latest and greatest technology gets to the people who will utilize and benefit from it as well as maintain a communication loop between producers, industry and scientists to insure that research remains relevant.

6. Shared System Resources – Art Program (FSU, NCF) - \$483,840

- FSU and NCF seek funding to expand programs that address anticipated student demand and expand engagement with the community. Key elements of the proposal include:
 - FSU will expand its graduate program in Museum Studies, taking full advantage of the resources of the Ringling Museum. It is anticipated that the program will necessitate the hiring of additional faculty that can be shared between FSU and NCF;
 - A joint position in Asian Art will be established, providing curatorial service to the Ringling Museum's new Center for Asian Art and instruction to NCF students. Asian Art has long been cited as a deficit in the New College program ("White Paper: Strategic Plan for the Arts, New College of Florida," 2011, p. 10);
 - Graduate students from the Asolo Conservatory will supervise theatrical activities for NCF students as part of a teaching practicum. New College will provide access to Mildred Sainer Music and Arts Pavilion and the Black Box Theater;
 - The NCF and Ringling Museum libraries will coordinate efforts and serve students and faculty of both institutions. Special emphasis will be placed on the management of digital collections;

2015-2016 LBR

- A joint Artist-in-Residence program will support the NCF studio arts program and the Ringling Museum. This program will provide additional instructional resources for NCF and will add to the Ringling Museum's emphasis on contemporary art. This position would be modeled on a post-doctoral fellowship;
- FSU doctoral students in Museum Education will complete half of their coursework at the Sarasota campus. These select doctoral candidates will teach undergraduate NCF classes using The Ringling as their lab;
- NCF and FSU will develop a 3+2 program in Arts Administration through FSU's Department of Art Education. NCF students in the arts and humanities provide outstanding prospects for FSU's Master's program in Arts Administration. In addition to course work taken in Tallahassee, NCF students will receive undergraduate thesis credit for their Master's thesis. NCF and FSU students will jointly benefit from internships with Sarasota's many professional arts organizations, including the Sarasota Orchestra, the Sarasota Ballet, the Sarasota Opera, Florida Studio Theater, the West Coast Black Theatre Troup, and La Musica Chamber Music Festival;
- FSU and NCF will share services and facilities resulting in increased administrative efficiency and reduction in cost. NCF's existing counseling and wellness and student life services will be extended to FSU Theater and Museum graduate students while in Sarasota. Also, NCF will include FSU in planning for new student housing facilities. NCF summer housing is also an option.

Return on Investment

- Increase recruitment and retention efforts in the arts program at both institutions; job connections relating to the arts program; and expanded fundraising opportunities for both universities.

7. Team Educational Attainment Initiative - \$15 M

- There are three areas where the supply of graduates from public and private colleges and universities in Florida at the bachelor's degree level is

2015-2016 LBR

more than 1,000 less than what is needed by business and industry in Florida, annually. This gap was identified as part of the collaborative work undertaken by the Access and Educational Attainment Commission of the Board of Governors which included a collaboration between researchers from the Board of Governors, the Florida College System, the Florida Department of Economic Opportunity, the Florida Council of 100, the Independent Colleges and Universities of Florida, and the Commission for Independent Education.

The Targeted Educational Attainment (TEAm) initiative is a competitive allocation program open to all universities, and administered by the Board of Governors, that incentivizes the recruitment and graduation of students in the high-wage, high-demand fields of Computer and Information Technology, Accounting and Financial Services, and Middle School Teacher retention.

This initiative builds upon the TEAm grant program, funded with \$15M in 2013, to further meet demand and leverage institutional collaboration for the benefit of the students, business and industry, and the State. Four partnerships were funded with the first round of support; three focused on Computer and Information technology, one partnership was focused on Accounting and Financial Services and a grant focused on Middle School Teacher retention was not awarded. The currently funded partnerships focused on Computer and Information Technology will graduate over 500 more students than they would have served without the support in the 2017-2018 award year; leaving a gap of 1,700 additional graduates in this area still needed. By 2017-2018 the Accounting and Financial Services partnership currently funded will graduate 200 more students than they would have otherwise, reducing the gap from roughly 1,000 to 800. The need to middle school teachers remains unaddressed with an estimated 1,024 openings going unfilled each year.

\$15 million is requested to administer another round of funding to address the gap between the high-wage, high-demand jobs Florida needs and the number of graduates from public and private colleges and universities in Florida.

Return on Investment

- The gap analysis developed in support of the Board of Governor's Access and Attainment Commission identified high-wage, high-demand fields needed by business and industry in Florida. This initiative will result in an increased number of graduates from high demand disciplines and

2015-2016 LBR

increased employment in the occupations in demand. The net result will be a closing of the gap between supply and demand.

8. Faculty Development Initiative - \$198,008

- Through a competitive procurement process, the University of Central Florida was selected to provide State University System and Florida College System institutions with resources, instruction, and support for developing, delivering, and sustaining high quality faculty development initiatives. The target audience will be institutional faculty training leaders and administrators, and the program will consist of two primary components: an online faculty development toolkit and an annual faculty development workshop.

Return on Investment

- **The Online Faculty Development Toolkit** will be a comprehensive resource that will provide Florida's postsecondary community with the essential elements required to ensure a very high quality online faculty development program. It will leverage UCF's nearly two decades of successful faculty development experience and be similar in approach to UCF's existing Blended Learning Toolkit resource, which has been helping education professionals across the world develop and deliver quality blended learning courses since 2011.

The Florida Online Faculty Development Workshop will be a two-day train-the-trainer experience for faculty development professionals from across the state. It will prepare these education professionals to return to their campuses and effectively implement the best practices, resources, and tools contained within the Online Faculty Development Toolkit.

The Online Learning Faculty Development Community of Practice will become a statewide forum for ongoing collaboration and sharing of faculty development resources and effective practices. The community of practice will be facilitated by UCF through the Complete Florida Plus initiative and be an ongoing forum for advancing the scholarship of teaching and learning in the online environment.

9. Student-Centered Online Services Environment - \$2.2 M

- The Complete Florida Plus Program (CFPP) was established by the Florida Legislature with a major focus on providing access for students to online academic support services and information concerning distance learning courses and degree programs, and to facilitate degree completion

2015-2016 LBR

among Florida students. CFPP will develop a personalized education system to integrate and enhance the existing discrete student services offered through the former Florida Virtual Campus. These student centered services will provide personalized, targeted information through a web-based dashboard designed, in partnership with colleges and universities, to assist students in all aspects of their academic and student support needs. The system will utilize a dashboard that will integrate the currently separate applications and functions of FLVC to provide a more complete suite of services through an improved centralized interface; a collaborative, analytics-based admissions application that will allow for individual college and university customization in content and presentation with the ability to import existing high school transcript data to speed the process of completion; and concierge based services utilizing automated systems, knowledge base responses, and personal telephone, chat, or email communications.

➤ **Return on Investment**

By placing students first, this system will provide them with a new level of targeted services designed to enhance their progression to degree completion. In addition, the system will provide for the delivery of increasingly significant student analytics and student progression monitoring and intervention opportunities in support of state-level degree attainment initiatives. In turn, system efficiencies will also be gained through the delivery of increased shared student services.

10. Integrated Library System - \$4.5 M

- While the exact costs will depend on the system selected, initial vendor pricing indicates one-time implementation costs of up to \$4,500,000 (which includes migration costs, along with data and authorities cleanup, and an additional one-time outlay of up to \$1,100,000 to cover 2015-16 licensing overlaps or cost increases). These non-recurring figures are estimates and may change as a specific vendor and solution are selected.

An additional \$50,000 in recurring costs for ongoing data and authority's maintenance is also requested. (Starting in FY 2016-2017, additional recurring funds will be needed for the next-generation ILS licensing costs; those figures will be identified and requested at that time.)

Return on Investment

- Creating system efficiencies through enhanced shared resources is a major goal of the Legislature, the Florida College System, and the Board of Governors. If a SaaS (Software as a Service) solution is selected, the

2015-2016 LBR

support organization will be able to reduce the number of staff used to support the system. Changes in institutional workflows also offer the possibility to reduce staff time and effort. All the while, student services for the delivery of and access to resources will be heightened, supporting student retention and graduation.

11. e-Resources for STEM - \$2.2 M

- The Complete Florida Plus Program (CFPP), successor to the Florida Virtual Campus (FLVC), is legislatively required to license e-resources for the public postsecondary libraries in the Florida college and university systems. CFPP requests new funds to acquire a robust portfolio of common STEM e-resources for college and university libraries to support undergraduate students.

This request also includes the entrance of the 12th public state university, Florida Polytechnic University, to the SUS. Florida Poly greatly increases the need to provide access to the most current and up-to-date STEM resources, which will increase the cost to the system. For example, it will require an additional \$40,000 annually to provide Florida Poly access to Compendex and Inspec. While FLVC has successfully limited the costs of providing access to e-resources for Florida Poly in 2014 (by negotiating free trial access), these costs will rise for 2015 as vendors expect full payment. It is anticipated that the costs to add Florida Poly to the existing e-resources that FLVC provides to the SUS would be an additional \$250,000.

Return on Investment

- Florida's postsecondary institutions are striving to provide graduates for the knowledge economy who will work not only in Florida, but in the global marketplace. To meet the dynamic BOG Strategic Plan goal of 22,500 STEM undergraduates system-wide by 2025, the acquisition and enhancement of STEM and multimedia resources is imperative. Providing this critical support and access to resources for students and their programs will facilitate increased knowledge, encourage retention, and reduce time to graduation, especially in the key STEM fields.

12. Academic Shared Services - \$3.5 M

- **Press of Florida - \$690,074**

The University Press of Florida (UPF), the scholarly publishing arm of the State University System, is charged with selecting, editing, publishing,

2015-2016 LBR

and disseminating works of intellectual distinction and significance, works that will contribute to improving the quality of higher education in the state, and works of general and regional interest and usefulness to the people of Florida, reflecting its rich historical and cultural heritage and its intellectual and natural resources.

The mission is to create top tier, preeminent scientific journals that can replace the very expensive journals now purchased in the SUS. This venture help the SUS universities expand into STEM disciplines while adhering to newer Federal regulations regarding open access, create world-wide recognition of SUS research, advance the state's innovation goal, and begin to optimize SUS operational expenses.

Funds are requested to update an inventory and asset management system; to hire an Orange Grove Texts Plus editor to oversee the open access initiatives; and to launch a joint e-journals project with select SUS universities, Purdue University and Temple University.

➤ **Florida Academic Repository - \$1,112,798 M**

One of the greatest efficiencies the SUS could achieve is the construction of a Library Storage Facility that would provide for the de-duplication of certain library holdings across the system and free up much-needed space for other purposes on the campuses.

In 2008, the BOG approved construction of a High Density Library Storage Facility in Gainesville to be managed by UF on behalf of the SUS. In 2010, UF received \$2 million in planning money from PECO funds. The \$2 million received by UF was used to complete the design of the facility, which will have the capacity to house a shared collection of 5.2 million print volumes, and for preparation of the initial 250,000 volumes to be housed in the facility. This shared collection is identified as the FLorida Academic REpository (FLARE). Federal law requires that one print copy must be maintained in order for electronic copies to be circulated across the system; this facility would store the print copy. A request will be made for fixed capital outlay funding in the 2015 LBR in order to construct a permanent facility- \$18M in year 1 and \$6.7M in year 2.

During FY 2014-2015, it is anticipated that the FLARE collection will increase by at least 200,000 volumes. As a result, funds will be used to support costs associated with receiving and processing additions to the shared collection and to support the leasing of the building.

2015-2016 LBR

➤ **E-Journals - \$1,700,000 M**

This issue addresses the unique e-journal collections that service the STEM graduate education and research enterprise and are separate and apart from those purchased for the Florida Virtual Campus. These journal collections are critical to those efforts and, of course, will impact tech transfer and economic development downstream.

Return on Investment

- The 3 components of the Academic Shared Services initiative contain a common thread which is to improve efficiency in e-journal collections, library holdings, and publishing services for the state universities and to reduce costs in these areas to the state and students. The Academic Shared Services initiative meet the goals that have been articulated by the Board of Governors, the Governor, and the Legislature to reduce duplication; create alternative funding strategies thru entrepreneurial enterprises; and improve the quality, value, and cost of the educational experience for students.

13. Safety and Security Enhancement Efforts (NCF, USF-S/M) - \$720,564

- Expanded Campus Police staffing of up to 6 positions, along with additional equipment, are necessitated as a result of significant growth over the past 15 years at both institutions in terms of enrollment, employees and building square footage.

With the additional funds requested, the Department will have sufficient base funding to provide top quality safety, security and emergency response services in support of both campuses over the next decade. The Department will continue to be among the lowest staffed in the SUS, while serving as an exemplar of how services shared among two or more SUS institutions can save costs while providing excellent service.

Return on Investment

- Ensuring the safety and security of students, faculty, staff and the visiting public are of prime importance to NCF and USFSM. Campus law enforcement is a critical support service indirectly impacting all the performance metrics. The primary return on investment will manifest in supporting a positive campus climate conducive to learning, teaching, and working. This funding will allow the Campus Police Department to augment the range of services provided. Emergency response and communication capability will be significantly enhanced. An upgrade to the current radio system will allow for vital efficient communications with

2015-2016 LBR

local law enforcement partners across both Manatee and Sarasota Counties. Crime prevention programs and personal safety training will be expanded as will a wide range of other services, including but not limited to proactive and directed patrol, investigation of criminal and traffic offenses, participation on behavior intervention teams, nighttime escorts, and motorist assists. This funding will also allow Campus Police to continue to foster relationships with Federal, State, and local law enforcement agencies by allowing additional joint training opportunities and information sharing that will benefit both campus communities.

14. Shared Initiative - Reduction and Reallocation - (-\$10 M/+\$12 M)

- An amount of \$10 million would be deducted from each university's base budget and an amount of \$12 million would be allocated as a lump sum appropriation to support the shared initiative. The funds would be released by the Board of Governors based upon demonstrated savings that would occur through shared service contracts or collaborations initiated by the universities. Once released by the Board, the funds would be returned to the university to enhance the educational services of the institution.



State University System Statewide Initiatives (pass-through funds)

Moffitt Cancer Center - \$8.5 M

- Moffitt has made a lasting commitment to the prevention and cure of cancer, working tirelessly in the areas of patient care, research and education to advance one step further in fighting this disease. As part of an elite group of National Cancer Institute (NCI) Comprehensive Cancer Centers, Moffitt focuses on the development of early stage translational research aimed at the rapid translation of scientific discoveries to benefit patient care.

As part of the State University System, Moffitt is vital to the education of students and trainees in the field of oncology and biomedical research. Studies show that 65% of residents stay and work within in the state they train; therefore, it is vital that we maintain our oncology residents in order to combat Florida's burden of cancer.

State support will be used to increase and sustain the number of residents, fellows and students that participate and benefit from its Graduate Medical Education (GME), Graduate Biomedical and Other Research Education programs and to support various professional development opportunities for staff and students.

An additional \$8.5 million is requested for FY 2015-2016 to continue the effort of training the next generation of cancer researchers.

Institute of Human and Machine Cognition (IHMC) - \$3.5 M

- IHMC is requesting \$3.5 million from the State of Florida to enhance and grow current operations at its Pensacola and Ocala Florida locations. IHMC is a world-renowned research institute working in the areas of artificial intelligence, cyber security, robotics, assistive technologies, natural language understanding, data mining, and other related high technology fields. A 501(c)3 statewide research institute created pursuant to Section 1004.447 F.S., IHMC is part of the State University System of Florida with formal research affiliations with FAU, FIT, UCF, UF, USF, UWF, and the Moffitt Cancer Center. In 2013, IHMC entered into a formal collaborative research protocol with the Tampa Veterans

2015-2016 LBR

Administration and is currently engaged in several projects with that venue. IHMC has received national recognition for its community outreach initiatives, including its highly popular public evening lecture series, summer robotics camp, and youth-oriented science and educational outreach initiatives (Science Saturdays and I LOVE Science). A recognized economic driver, IHMC was honored with the top US Department of Commerce Award for Excellence in Technology-Driven Economic Development. This past December, IHMC scientists and researchers made worldwide news after placing first in Atlas and second place overall in an international DARPA dynamic walking robotics competition held in Miami, Florida.

Additional funding will enable IHMC to continue to enhance its operations and expand in research of national significance including advanced cognitive assistance technologies, network/cyber security, companion devices, exoskeletons, critical infrastructure protection, and sustainable energy modeling and simulation. This research expansion will occur in both downtown Pensacola and downtown Ocala, in part through the successful recruitment of top scientists and researchers to Florida. Maintaining prominence in current research areas and developing strength in these emerging research areas are vital to IHMC's continued growth and of critical importance to our national defense, security and overall societal needs.



State University System Other University Collaborative Efforts

The following initiatives may be reviewed and discussed by the CAVP group at a subsequent meeting held by the Academic and Student Affairs Committee in the near future.

1. Consortium of Metropolitan Research - \$12 M

- As part of this new partnership, FIU, UCF, and USF have been working closely together to share best practices, policies and programs to efficiently increase the number of graduates in high-demand areas and maximize career development opportunities.

The consortium has developed four interrelated strategies to meet these goals: (a) enhanced predictive analytic tools to identify students who may need extra help toward degree completion; (b) high-tech tracking pathways that provide integrated academic monitoring; (c) targeted support through personalized academic advising and career coaching; and (d) shared career readiness programs, including common internship and job-search databases that will provide students opportunities in Miami, Orland and Tampa Bay.

Return on Investment

- Through the investments requested by this Consortium, FIU, UCF and UCF project to collectively increase the number of baccalaureate degrees awarded by 12 percent, increase six-year graduation rates by 4 percentage points, increase the number of graduates employed in Florida by 3 percentage points and increase salaries of graduates by 10 percent by 2016.

2. Center for Adaptation, Resilience, and Sustainability (FAU, FIU, UCF, USF, FSU) - \$17.3 M

- Florida CARES is the essential next phase to address key needs of industry and communities, identified through consultations with stakeholders and Florida Climate Institute member universities.

2015-2016 LBR

Florida CARES will bring together prominent universities across the State in partnership with state and regional agencies and the business community to create an economy more resilient to risks from hurricane damage, periodic droughts and floods, higher sea levels, and future climate trends. It will develop research and deliver education programs in support of Florida's major economic engines (e.g., urban centers, tourism, agriculture, trade, and coastal marine resources).

Return on Investment

- Florida CARES will bring new revenue and jobs to Florida and will position our state as the global leader in risk management and resilient businesses and communities. Florida faces imminent and intensifying threats from rising sea levels, increasing temperatures, and extreme weather events. By proactively strengthening Florida's preparedness for these threats, economic benefits could be realized through increased public safety and the protection of a diverse economy with trillions of dollars in assets and infrastructure.

3. Sunshine State Education and Research Computing Alliance (FAU, FIU, UCF, USE, FSU, UF) - \$6.9 M

- This issue is a new service to build a statewide infrastructure to support collaborative research in the age of big data in which only the most competitive efforts can obtain funding for new projects or for continuing existing projects. This infrastructure will make researchers in the SUS more competitive in their research activities and in obtaining external funding for their research projects. This issue addresses all three of the goals articulated in the Scholarship, Research, Innovation section of the 2012-2025 Board of Governors Strategic Plan.

The service will be provided by the Sunshine State Education and Research Computing Alliance (SSERCA) through the member institutions (UF, FSU, USE, UCF, FIU) and consists of the following components:

The one-time acquisition of data storage systems for \$1,000,000 at each of the six institutions acting as part of the SSERCA organization (**non-recurring**), with \$60,000 per year annual maintenance contracts at each of the six institutions (**recurring**);

Provide one expert person at each of the six institutions to support the use of the service for \$91,000 per year (**recurring**).

There is an aligned budget request for consideration by the Legislature through the Department of Education from partner institution UM, also a

2015-2016 LBR

member institution of SSERCA. That request is for UM to provide the seventh component of the state-wide integrated storage system for \$1,000,000 with \$60,000 per year annual maintenance contract and a full time expert support staff at \$91,000 per year.

Return on Investment

- The “State University of Florida Board of Governors Strategic Plan 2012-2025” lists on pages 16 and 17 a number of goals that this issue is addressing in a direct way.

The opening paragraphs state that “...the Board of Governors will work to increase federal and private funding for collaborative research that targets STEM initiatives...” The proposed infrastructure will allow researchers at SUS systems to write competitive proposals to do exactly that.

The Plan continues with “...the Board of Governors will more sharply focus the research agenda of the State University System ... by strengthening research collaboration among the universities.” SSERCA is an organization that has the mission to foster and support collaboration on the computing infrastructure for education and research and the infrastructure proposed in this issue is a concrete, enabling, and cost effective step towards that objective.

The first Goal in the Plan is on Excellence and seeks to “...strengthen the quality and reputation of scholarship, research, and innovation.” The proposed state-of-the-art infrastructure for collaborative research on Big Data Science and Engineering is an investment that will enable the highly talented researchers in the SUS to reach this goal.

The second Goal in the Plan is to increase productivity. By providing shared, professionally managed infrastructure, the researchers will be able to spend more time on their research and commercialization efforts than on dealing with infrastructure needed to do their work.

The third Goal in the Plan seeks to “increase collaboration and external support for research activity.” Providing the faculty, the students, and research associates in the SUS institutions with the proper infrastructure will allow them to make this goal a reality.



State University System Matching Programs & Other University Initiatives

Major Gifts Matching: \$286.8 M

Although this program was suspended on June 30, 2011, approximately \$286,828,780 represents the total amount of state matching funds outstanding as of this date. The matching program provides state matching funds to universities for private donations that establish permanent endowments with the proceeds of the investments used to support libraries, instruction, and research programs.

Of the total amount, \$1,772,500 is for the Theodore R. and Vivian M. Johnson Scholarship Program. The purpose of this program is to provide scholarships to benefit disabled students with financial need and attend a state university in Florida.

Public / Private Partnerships	
Major Gifts Matching Endowment Program	\$285,056,280
Johnson Matching Gift Program	\$1,772,500

The total amount of state matching funds by university is presented as follows:

	2006-07	2007-08	2008-09	2009-10	2010-11	2012-13	Total
UF	\$15,910,175	\$34,100,562	\$19,493,131	\$26,203,955	\$35,297,440		\$131,005,263
FIU	\$201,699	\$8,334,888	\$1,534,335	\$8,813,845	\$22,887,626		\$41,772,393
FSU	\$443,732	\$11,128,182	\$4,809,888	\$10,382,199	\$12,500,578		\$39,264,579
USF	\$137,057	\$12,994,204	\$3,568,757	\$2,678,732	\$6,631,380		\$26,010,130
FGCU	\$50,000	\$3,873,491	\$903,173	\$1,566,758	\$5,358,859		\$11,752,281
UCF	\$62,550	\$4,423,813	\$2,091,570	\$1,153,227	\$2,533,846		\$10,265,006
FAU	\$125,000	\$5,714,511	\$663,142	\$1,084,421	\$1,931,551		\$9,518,625
UNF	\$404,794	\$1,532,066	\$909,135	\$1,218,993	\$5,195,198		\$9,260,186
NCF	\$0	\$1,195,212	\$313,923	\$100,000	\$938,860		\$2,547,995
UWF	\$420,000	\$107,382	\$795,896	\$270,129	\$844,694		\$2,438,101
FAMU	\$75,000	\$498,643	\$0	\$0	\$648,078		\$1,221,721
Board*	\$0	\$0	\$250,000	\$227,500	\$1,070,000	\$225,000	\$1,772,500
Total	\$17,830,007	\$83,902,954	\$35,332,950	\$53,699,759	\$95,838,110	\$225,000	\$286,828,780

*Johnson Scholarship

2015-2016 LBR

University Initiatives: \$132.4 M

A number of universities submitted funding requests for initiatives specific to the goals and objectives currently in place at their institution. The initiatives below are new initiatives and non-recurring initiatives from 2014-2015 in which each university has identified as being critical to improving various performance metrics or research efforts at their institution.

The following university initiatives were submitted for inclusion in the SUS 2015-2016 LBR:

Unique University Initiatives	
FAMU - Pharmacy Faculty Salary Adjustment	\$700,000
FAMU - College of Agriculture/Food Services	\$800,000
FAMU - Engineering School	\$30,623,700
FAMU - Online Programs and Course Offerings *	\$2,000,000
FAMU - Crestview Center *	\$1,500,000
FAU - Student Success	\$5,000,000
FAU - Sustainable Research Campus	\$19,450,000
FAU - National Marine Renewable Center	\$1,500,000
FAU - Strategic Partnerships CAPTURE Project	\$975,000
FAU - Max Planck Scientific Fellowship Program	\$500,000
FAU - Indian River Lagoon Observatory	\$500,000
FAU - Tech Runway *	\$1,050,000
FAU - Max Planck Scientific Fellowship Program *	\$1,500,000
FGCU - Curriculum Review, Development and Enhancement	\$4,178,500
FIU - Center for Children and Families	\$2,000,000
FIU - Health Economics and Strategic Solutions	\$400,000
FIU - Panther Life *	\$300,000
FIU - Fostering Pride *	\$300,000
FIU - Health Embrace Initiative *	\$1,000,000
FIU - STEM Innovation Investment	\$2,500,000
FSU - Magnetic Resonance Imaging System	\$2,550,032
FSU - Information Technology and Data Security	\$3,500,000
FSU - Health Equity Research Institute *	\$400,000
FSU - FSU College of Law Scholarships *	\$1,000,000
UF - Engineering and Industry Experimental Station	\$5,500,000
UF - Florida Agricultural Education Initiative	\$1,500,000

2015-2016 LBR

UF - Translational Research/Neurodegenerative	\$1,250,000
UF-IFAS - Center for Leadership	\$891,620
UNF - Advanced Manufacturing/Material Innovation	\$3,000,000
UNF - Coastal Research Initiative	\$1,865,079
USF - Center for Cybersecurity	\$7,100,000
USF-S/M - Expansion of STEM Offerings	\$1,452,724
USF-HSC - Healthy Heart Institute	\$15,000,000
USF-HSC - Physician's Assistant Program	\$1,584,000
USF-HSC - Center for Public Health Genomics	\$1,500,000
USF-S/M - Center for Partnerships for Arts-Integrated Teaching *	\$100,000
USF-S/M - Small Business Development Center *	\$100,000
USF-SP - Family Study Center *	\$250,000
USF-SP - Greenhouse Project *	\$100,000
USF-SP - Infant Mental Health Center *	\$1,000,000
USF-HSC - Alzheimer's Institute *	\$1,250,000
UWF - Strategic Academic Programs in STEM/Economic Dev.*	\$2,000,000
UWF - Student Success	\$2,500,000
UWF - Veteran/Military Student Success	\$250,000
Total	\$132,420,655

*Non-recurring initiatives from FY 2014-2015 submitted by institutions in an effort to restore the dollars as recurring for the upcoming year.



State University System 2014-2015 Performance Funding Initiative

Universities were requested to provide information on the intended use of the 2014-2015 performance funds.

The following activities are currently underway at the university as a result of the performance funds allocated to the system for FY 2014-2015:

- Initiation of a Center for Undergraduate Student Success designed to increase student retention, student progression, and student graduation; FAMU;
- Investments in academic program accreditation to obtain initial accreditation and reaccreditation of academic programs such as the salary increases for Pharmacy faculty in order to maintain accreditation – FAMU;
- Bolstering tutoring, mentoring, lab and writing services to better assist students in meeting educational goals – FGCU;
- Additional full time and adjunct faculty to meet the growing demand by students for classes needed towards graduation – FGCU;
- Implementation of an academic term redesign project to assist students in enrolling and progressing more timely towards their degree goals – FIU;
- Investing in classroom enhancements, initiatives to retain students, and student academic support to help students excel in their degree programs – FIU;
- Investing in energy and materials, coastal and marine ecosystems, and brain health and disease initiatives – FSU;
- Enhancing efforts in entrepreneurship activities 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 graduate students in critical areas and create a platform for investors to partner with the institution – FSU;
- Additional faculty to enhance undergraduate and graduate academic experiences by ensuring the availability of course offerings to meet student demand – UCF;
- Utilizing big data, modeling, and data mining to deliver personalized, real-time recommendations designed to facilitate student completion and success – UCF;

2015-2016 LBR

- Merit pay raises to reward and retain faculty and staff to ensure the goals of preeminence are met – UF;
- Funds to improve career counseling and to increase student internship placements – UNF;
- Investments in faculty and technology in areas of strategic emphasis, and aggressive recruitment and retention programming – UNF;
- Creation of a College and Career Success/ Access Center to provide a coordinated, college-wide tailored to each students' unique career path needs – USF-S/M;
- Exploring the establishment of a new College of Applied Sciences that will create linkages with environmental science initiatives at New College of Florida and other engineering programs housed at other colleges and universities throughout the state – USF-S/M.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	Florida A&M University
Amount Allocated:	\$10,844,591

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. **Description:** The funds will supplement external funds to help initiate a Center for Undergraduate Student Success including a summer bridge program: This Center will build on and consolidate some initiatives in student retention begun in the past 4 years. This new investment is designed to increase student retention, progression and graduation. This will consolidate a number of efforts surrounding student academic advising, career counseling, tutoring, and student debt reduction. The University is also reviewing options for a student tracking system such as University of Florida's system which some other SUS institutions have adapted, or a commercial product such as Degree Works to help monitor successful student progression through majors and enable the university to intervene if students do not seem to be making adequate progress.

Investments are being made in academic program accreditation to obtain initial accreditation or reaccreditation of academic programs. This included meeting the remainder of the salary increases for Pharmacy faculty in order to maintain accreditation. Meeting the accreditation standards provides quality assurance, assists students successfully matriculate through the programs, and provides an advantage in seeking employment upon graduation.

A new program, BS/BA Interdisciplinary studies, is being implemented in Fall 2014, using some of the funds, which will provide an avenue for students to progress and complete their baccalaureate degree.

Providing an increase is essential to retaining and recruiting faculty and staff and increasing morale, which will impact the instructional and other services students will receive. The University is also investing in new faculty hires to reduce reliance on adjuncts in favor of full time faculty. This too will enhance student success.

Component of the 2015-2016 LBR

The goal of the **Targeted Educational Attainment (TEAM)** Grant awarded to FSU and FAMU is to increase the number of bachelor's degrees awarded in the areas of computer science, information technology, and computer engineering. The project focuses on:

- a) Expanding outreach efforts to students in high schools and state colleges,
- b) Enhancing the retention of students and placement of graduates in internships and jobs,
- c) Establishing strong partnerships with business and industry,
- d) Providing ongoing professional development for students, and
- e) Developing a media presence to promote computer and information technology careers.

II. Return on Investment

	ONE-YEAR TREND	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
FTIC 6 year Graduation Rate [Includes full- and part-time students]	2%	42%	43%	44%
Academic Progress Rate [FTIC 2 year Retention Rate with GPA>2]	7%	73%	76%	77%
Percent of Bachelor's Degrees Without Excess Hours	n/a	35%	37%	39%

Key Performance Metrics for the FAMU TEAM Project:

- Unduplicated Upper Division Enrollment (Increase of ~26% by 2017).
- Number of Bachelor's Degrees Earned (Increase of ~26% by 2017)
- Completion Rates (Increase to ~75% by 2017).



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	Florida Gulf Coast University
Amount Allocated:	5,936,120

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I The influx of performance funds has permitted Florida Gulf Coast University (FGCU) the opportunity to continue to meet mission objectives and achieve greater performance going forward. To that end, the institution has enacted multiple initiatives (with the Return on Investment immediately following):

Advising: Building upon steps taken in FY 13-14, FGCU has established ten additional faculty advisor positions in order to provide a “best practice” ratio of advisors to students. A focus will be made on “super seniors”, who are seniors with more than enough credits to graduate but still accumulate credits. Additionally, the First Year Advising Center has a presence, located at the newly constructed Eagle Hall, providing support and advising to students within their living environment. The approximate allocation is \$540,000

Return on Investment: We anticipate this will in part lead to a 4-percentage point gain in the FTIC-graduation rate to occur by 2016-2017. This should also add to our degree production in areas of strategic emphasis at the bachelor’s level (3 percentage points) and at the graduate level (3 percentage points). And it should help us reduce the percentage of graduating students earning excess credits with a resulting increase of 3 percentage points (i.e., from the current 74% to 77% of all graduating student with no excess hours).

Retention Strategies: To further assist with student retention, FGCU is bolstering its tutoring, lab, writing center and mentoring functions, to greater assist students towards meeting their educational goals. The Careers Services department has been funded in order to expand its reach, and Adaptive Services has grown in order to assist with accommodative testing. The approximate allocation is \$405,500.

Component of the 2015-2016 LBR

The institution has enacted a program known as the “First Year Experience” and will be developing programs aimed at new students with the goal of enhancing success and increasing retention. As part of this program, FGCU is hosting STEM camps to make potential students aware of degrees in STEM, including first generation and underrepresented students. The cost of this initiative is approximately \$144,200

Return on Investment: These support programs should help us increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; our FTIC graduation rate by 4 percentage points; these actions should also help us to increase the university access rate (i.e., from 35% in 12-13 to 39% in 2016-2017); graduate more minority students by 3 percentage points (i.e., 23% to 26% of the annual total) and increase in part our bachelor’s degree production in areas of strategic emphasis by 3% points between 12-13 and 16-17 (i.e., from 44% to 47% of total bachelor’s degrees awarded).

Faculty Hiring: Florida Gulf Coast University is a growing campus, and as such is investing in the faculty and adjuncts necessary to offer a schedule that not only meets demand, but provide programs that target academically talented students. This investment of \$2,317,425 will provide new and returning students with the classes needed to progress towards graduation.

Return on Investment These additions should help us in part to further reduce the number of students graduating with excess credit hours with a resulting increase of 3 percentage points (i.e., from the current 74% 12-13 to 77% 16-17 of all graduating student with no excess hours); increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; and our FTIC graduation rate by 4 percentage points over this same time period.

Support Staff: In coordination with the hiring of new faculty, academic support staff are being brought in to not only support the faculty, but to support web learning and data analysis. Furthermore, added funds in other personal services and expense are required to meet growing operational costs stemming from growth and inflation. The total allocated is \$587,300

Return on Investment: These support programs should help us increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; our FTIC graduation rate by 4 percentage points; these actions should also help us to increase the university access rate (i.e., from 35% in 12-13 to 39% in 2016-2017).

Marketing: The institution is investing \$500,000 in the development of marketing team and strategy, for the purpose of reaching out to potential students and attracting talent to the university and the state.

Return on Investment: This strategy will in part contribute to increase the university access rate (i.e., from 35% in 12-13 to 39% in 2016-2017) and eventually graduate more minority students by 3 percentage points (i.e., 23% to 26% of the annual total over this same time period.)

Library Resources: Library materials are another area of investment which is needed to assist students in their progression. By maintaining a current library collection, students are able to assimilate the best possible information and data. For fiscal year 14-15, the institution is investing \$110,000.

Return on Investment: These additions to our Library should help us increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; and, our FTIC graduation rate by 4 percentage points

Operations: The balance of the funding (approximately 1,330,000) is allocated for operational infrastructure. These funds will provide the needed infrastructure to maintain the campus. Examples include campus police, computer programmers, admissions officers, and various roles within student affairs. This investment provides the infrastructure to a productive learning environment.

Return on Investment: The enhanced efficiency these infrastructure changes bring about will in part help us to control cost per degree which we hope will remain below \$30,000 over the next several years.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	Florida International University
Amount Allocated:	\$25,277,175

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I. **Description** *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

The funds allocated will be used to continue to improve areas that focus on innovation and teaching and create a stimulating environment for student learning. The main areas of focus are related to improving academic progress, improving the six year graduation rate, and expanding areas of study in programs with strategic emphasis for the state and community.

FIU will focus efforts on improving our academic progress rate. A significant amount will be invested in classrooms enhancements, initiatives to retain students, and student academic support to help students excel.

Another area of emphasis is improving our FTIC six-year graduation rate. Funds will be used to hire more faculty in strategic areas and revise the academic term structure to meet student demand through an academic term redesign project. This project will provide additional options for students to enroll and progress more timely to their degree completion while building on the success of the Graduation Success Initiative (GSI).

Lastly, we will be investing in expanded science offerings, more peer-led learning groups, and progressive faculty-led curricular in an effort to deepen our role as the nation's leading producer of STEM degrees for minority students. These initiatives will support the production of degrees within programs of strategic emphasis.

These initiatives combined with career and internship programs, will provide our students a high quality, well-rounded and first-rate educational experience from admissions through graduation and into the workforce.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

We plan to improve the retention rate by offering the programs and courses desired and required for enrollment and progression. The projects to be implemented reflect our goals to be student driven and student focused. All of these investments will enable students to complete courses faster and meet their degree completion goal. We plan to increase our Academic Progress Rate from 78% to 81% by 2016-2017.

Our goal is to increase the FTIC six-year graduation rate by 2% per year and attain a 58% rate by 2016-2017. We plan to do so by providing more options to students to complete their degree requirements through additional terms for online and onsite programs. The institution will leverage improved data analytics to ensure available class sections are available for degree completion. Students will also benefit by being able to better closely monitor their progress and make more informed decisions.

Our STEM focused program, FIUTeach, prepares Math and Science related teachers and is expected to graduate 50 high school STEM teachers annually. As the top producer of STEM degrees for minorities, FIU will continue to expose students to innovative evidence-based instruction and learning technologies and allocate funding to support their success. This initiative along with other improvements will contribute to a 2% increase in Bachelor's and Graduate degrees awarded within programs of strategic emphasis by 2016-2017.

FIU is also expanding internship opportunities locally, nationally and internationally. Internship opportunities ensure our students gain practical skills for the work place while building relationships and contribute to increasing the percentage of bachelor's graduates employed full-time in Florida. We anticipate this metric to improve from 67% to 69% by 2016-2017.

Investments to improve the metrics mentioned above will have a multiplier effect and positively impact the results of other metrics such as percentage of

bachelor's degrees without excess hours, average cost per bachelor's degree, and median wages of graduates employed full-time. Ultimately, all these initiatives are accomplished by investing in faculty, staff, infrastructure, and program implementation that create well-educated employees and entrepreneurs. FIU's obligation to produce degrees that make it possible for graduates to put learning and research to work on a regional, national and global stage is paramount.

FIU is working closely with the Miami-Dade County to ensure that higher education initiatives are directed to job creation and entrepreneurship in the community. Our students have very strong community ties as a significant number of FIU graduates live and work in the three-county area of South Florida. When combined with our efforts to increase the degrees awarded in programs of strategic emphasis, and achieving our goal to graduating students sooner in targeted industries, FIU will be making a significant contribution to the economic development of our community in South Florida and the state of Florida.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	FLORIDA STATE UNIVERSITY
Amount Allocated:	\$21,064,887

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I. **Description** *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

FSU's primary initiative at this point in time is to become a National Top 25 Public University, a ranking highly dependent on strategic investments. We are actively engaged in strategic hiring initiatives in energy and materials, coastal and marine ecosystems, and brain health and disease. We are also continuing to invest in resources to support graduate students in critical fields and to increase undergraduate research opportunities in a variety of fields including those critical to the state of Florida.

FSU is also focused on becoming a State and National Leader in Student Career Readiness. Currently, we are enhancing our curriculum to support critical thinking, problem-solving, communication, collaboration, creativity and innovation skills, all integral to the success of our students. Our Entrepreneurial University Program also supports this strategic initiative, giving students of any major access to business courses. We have invested in additional faculty that are necessary to open a four-course sequence in entrepreneurship to all majors, as continuing to add Entrepreneurs-in-Residence to our colleges to enable both 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 graduate students in critical fields, and create a platform for investors to partner with the University.

Component of the 2015-2016 LBR

We are continuing efforts to improve student-to-faculty ratios by recruiting, developing, and retaining outstanding faculty members to address student needs at all levels. Through success in faculty hiring and improving our student to faculty ratio, our strategic goals, including those of becoming a National Top 25 Public University, can be achieved.

Our strategic initiatives will have a positive impact on our accomplishments relative to the performance funding metrics, particularly those related to academic progress and graduation rates, degrees awarded in areas of strategic emphasis, post-graduation performance and faculty awards. We will also continue to invest in our status as one of the nation's most efficient institutions by constantly seeking new opportunities for efficiency.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

Targeted hiring in critical areas will help to address needs of the state of Florida. These investments are tied to research funding initiatives, and are expected to result in increases in national rankings of our programs and institution. We expect to maintain at least one field in the top 5, achieve two fields in the top 10, one in the top 15, two in top the 20, and move Engineering into the top 50. These advances in recognition of our programs will place FSU among the truly first-rate public universities and help us achieve our top 25 ranking among all public universities.

Efforts related to Student Career Readiness will serve to strengthen the value of any degree offered at FSU. Opening business courses to students of any major and strengthening students' critical thinking, problem-solving, communication, collaboration, creativity and innovation skills will promote the entrepreneurial potential and job prospects of all students. Related programs will also build FSU's community and industry partnerships.

The loss of faculty in recent years has resulted in decreased course availability and larger classes, likely increasing students' time to graduation. Having fewer faculty members also diminishes the ability of the university to

accomplish its research mission and expand contract and grant funding, all of which also reduce opportunities for our students who benefit by working directly with faculty in their research labs. Hiring efforts will result in tangible improvements related to the efficient use of dollars, along with more intangible gains in the quality of education provided to our students and enrichment of their overall experience on campus. World-class programs delivered by a dedicated and creative faculty inspire students to reach new levels of achievement.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	University of Central Florida
Amount Allocated:	\$21,880,157

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. Description *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

The Performance-based Funding Model has made possible the continuation and/or creation of a number of initiatives and programs that will directly drive improvements in academic quality, operational efficiency, and return on investment, as follows:

Faculty Hiring

\$17,056,461

(\$1,900,000 for planned 2014-15 hires + \$10,450,033 for planned 2015-16 hires + \$4,706,428 for planned 2016-17 hires)

New funding from state Legislature will allow UCF to hire upwards of 100 additional full-time faculty members over the next few years, particularly in the areas of specific focus (e.g. STEM, areas of strategic programmatic emphasis, and emerging fields).

Due to the timing of the allocation of funds and the faculty recruitment cycle, the majority of the hires will take place next fiscal year. The estimated ending balance as of June 30, 2015 will be used on a non-recurring basis to support faculty start-up packages for these hires, which are a necessary and expensive tool to recruit and retain exceptional faculty.

Hiring full-time faculty members enhances the undergraduate and graduate academic experience by ensuring the availability of course offerings to meet student demand; decreasing class size; increasing student engagement; supporting undergraduate and graduate research; and stabilizing UCF's student-to-faculty ratio.

While UCF will hire some full-time lecturers to address our teaching missions, the majority of these 100+ new hires will be tenure-track faculty. An emphasis on hiring tenured and tenure-track faculty members addresses the overall mix of faculty and the recent reliance on non-tenure-track faculty members, while boosting UCF's growing research promise and potential economic impact. Additionally, UCF is encouraging cross-disciplinary hires to support interdisciplinary teaching and research, in such fields as bioinformatics and data analysis.

Component of the 2015-2016 LBR

To ensure continued growth and quality of research and graduate activity, UCF also plans to expand and enhance programs in focused areas. This will include the hiring of research-intensive faculty members; the expansion of biomedical and clinical research; the development of new graduate medical education programs; and the development of new health-related programs that capitalize on College of Medicine partnerships. Increasing graduate activity also furthers the volume and economic impact of UCF research, building upon the \$1.1 billion in external research grants received in the past decade.

Civitas Learning and Predictive Analytics Reporting (PAR)

\$235,000

Partnering with an external partner, Civitas Learning, UCF continues to make excellent progress towards its goal of utilizing big data, modeling, and data mining to deliver personalized, real-time recommendations designed to facilitate student completion. Supporting UCF's Civitas effort is a 20-school coalition called the Predictive Analytics Reporting Framework. Initially funded by the Gates Foundation, this group combines big data from all 20 schools to more precisely identify clusters of at risk students and then develop solutions for their challenges.

UCF's involvement includes contributing data to a single federated database spanning twenty institutions, assessing cross-institutional benchmarks, evaluating institutional-specific predictive models, and cataloging over 70 best practices that will allow for the direct mapping of successful interventions to specific student predictor behaviors.

DARS to PeopleSoft Conversion

\$1,441,781

The conversion of UCF's undergraduate degree advising/audit software from the DARS system to PeopleSoft initiated last fiscal year is underway, and will add a new dimension to the predictive models also well under development.

During the current phase, the 395 program builds required for each year across four catalog years are being created. To date, 13% of programs are verified and 31% are in-progress.

Graduate Fellowship Program

\$695,000

It is anticipated that these funds will permit UCF to award a one-time, \$5,000 fellowship to up to 139 qualified Master's students in programs of strategic emphasis during the 2014-15 academic year.

Targeted Educational Attainment (TEAm) Grant Projects

In 2013-14, UCF, USF, and FIU were awarded legislatively appropriated funds by the Board of Governors to pay down the gap in Information Technology, Computer Science, Computer Engineering, and Management Information Systems. Additionally, the same collaborating institutions were awarded funds to individually implement a number of jointly developed interventions aimed at increasing the number of bachelor's degrees in accounting at their respective institutions.

The funds for each of these programs are being invested, as follows:

CSIT (UCF-USF-FIU) TEAm: Urban University Coalition Response to Florida's Computer and Information Technology Workforce Needs

\$1,790,667

Component of the 2015-2016 LBR

The three institutions are collaborating with the intent of jointly furthering the following objectives:

1. Assist UCF, FIU and USF to grow programs that lead to high-skill jobs in computer-related disciplines,
2. Increase the number of Floridians completing programs in these high demand areas at these institutions, and
3. Wisely leverage the strengths of UCF, FIU, and USF for a sustainable future.

The partnering institutions will use BOG funding—as well as committed university funding—to support additional faculty hires, adjunct hires, course facilitators, teaching assistants, and undergraduate advisors that will be essential to handle a dramatic anticipated increase in undergraduate, computer-related fields. A Metrics and Assessment Committee has been established to measure progress towards established goals and return on investment.

An innovative, collaborative approach to increasing the supply of quality accounting graduates in Florida

\$661,248

The interventions aimed at increasing the number of bachelor's degrees in accounting comprise the following: (a) capping class sizes and increasing the number of sections of key upper-level accounting courses by hiring additional instructional faculty; (b) developing online tutorials and increasing the number of live tutors to facilitate successful completion of rigorous upper-level accounting courses; (c) hiring an internship coordinator to identify accounting internship opportunities and match students with these opportunities; (d) incentivizing timely graduation by providing scholarships to students who successfully follow the recommended course completion path; (e) hiring advisors for accounting students to provide targeted advice and closely track the progress of accounting students to facilitate timely graduation; (f) developing week-long summer “bridge programs” for high-school students aimed at educating them about careers in accounting and the nature of an undergraduate program in the field; and (g) expanding marketing of the accounting major, among both high-school students and college freshmen who are undecided on their major.

Other Initiatives/Programs and Partnerships

Additionally, UCF continues its efforts to enhance student success with the following initiatives and partnerships:

DirectConnect to UCF, the nation's most successful articulation program between local colleges and their university;

The Florida Consortium of Metropolitan Research Universities—FIU, USF, and UCF—has received a grant from the Helios Education Foundation that supports a team of 20 professionals to pursue joint efforts. The Consortium has already had significant success with the award of two of the four SUS TEAM grants, supporting the enrollment and success of students in areas of strategic emphasis;

The National University Innovation Alliance, funded by USA Funds and the Ford, Gates, Kresge, and Lumina foundations, is committed to providing access to students—especially low-income and first generation students—to affordable education at each of our research-intensive universities. The 11 member Alliance includes Arizona State, Georgia State, Iowa State, Michigan State, Ohio State, Purdue, California-Riverside, Kansas, Oregon State, and Texas-Austin.

Several Alliance initiatives are in progress. One of the most promising has been the identification of a best practice for student success by each of the eleven schools. Three member institutions have then volunteered to join the lead institution and test the scalability of the practice with a goal of its being adopted by all the Alliance schools;

The John N. Gardner Institute for Excellence in Undergraduate Education, to institute a nine-dimension action program to enhance transfer student success. Among the nine actions are raising faculty awareness of transfer issues, shaping the university culture to better accommodate transfer students, and focusing on transfer student transition points;

The UCF Task Force on Excess Hours, which is at work on a number of reduction strategies, including the addition of an excess-hours calculator on every student's online degree plan showing how many excess hours the student's planned course of study will generate; the creation of a STEM interdisciplinary major; a tightening of the withdrawal-from-class policy; and an intensive campaign to educate students about the causes and consequences of excess hours.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

As a result of the continued and combined efforts and new strategies described above, UCF is projecting improvements in all metrics as specifically outlined in the university's 2014-15 Work Plan—particularly the six-year graduation rate, academic progress rate, bachelor's and graduate degrees awarded in programs of strategic emphasis, and number of bachelor's degrees awarded annually.

Some notable anticipated outcomes include a 90 percent academic progress rate and a 70 percent six-year graduation rate during the next three years. At the same time, the university is projecting less than 1 percent increase in the cost-per-bachelor's degree, compared to the projected 2 percent consumer price index increase between 2014 and 2015.

Also worthy of mention is that the CSIT TEAm program is anticipating a 67% increase of degrees in the computer-related fields by 2017-2018. The significant increase in degrees is a bold and challenging initiative, but one that carefully focuses on the goal of this TEAm grant effort to significantly reduce the workforce gap in the computer-related fields.

Additionally, it is projected that the number of UCF's patents will grow, and the metric will continue to distinguish the university's research activity. This past year, UCF was ninth among U.S. public universities for the number of patents produced.

Finally, UCF continues to grow the number of degrees awarded in areas of strategic emphasis, and currently accounts for 21% of all baccalaureate degrees granted in the State University System (and 17% of all baccalaureate degrees in areas of strategic emphasis).



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	University of Florida
Amount Allocated:	\$27,560,214

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. Description *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

These funds have been allocated to raises for faculty, staff, and graduate students. Faculty have been allocated a 3.5% merit pay raise package, staff have been allocated a 2.5% merit pay raise package, and graduate assistants have been allocated a pay raise package amounting to approximately 4%.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

Faculty merit pay raises are needed to reward and retain UF's best faculty and to ensure the goals of the preeminence initiative are met. Similarly, graduate assistant pay raises are needed to keep graduate stipends competitive and enable UF to attract excellent students. Staff pay raises are allocated to reward and retain outstanding staff members.

These pay raises improve morale and productivity and help UF retain key personnel.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	University of North Florida
Amount Allocated:	\$7,360,977

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I. **Description** (*Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.*) The \$7.4 million dollars will be used to advance UNF's performance on nine of the ten metrics adopted and identified and selected by the Board of Governors. The university will also be working on the 10th metric, increasing use of distance learning, but will be using other funds. The greatest attention will be focused on the academic progress rate and its corollary the six year graduation rate, followed by producing graduates in strategic areas of emphasis. Funding for these four metrics takes various forms including improved advising, programs to turn gatekeeper into gateway courses, investments in faculty and technology in areas of strategic emphasis, and aggressive recruitment and retention programming.

By working on recruitment programs we should also be able to increase our undergraduate enrollments modestly helping to bring down the cost of an undergraduate degree, although we remain committed to small class sizes and the use of fulltime faculty in teaching undergraduate coursework.

The funding we have directed for Career Services will be used for improved career counseling and to increase student internship placements, addressing both selection of majors of study and post-graduation placement in the workforce.

Some of the funding will also be used to balance university reserves in keeping with state law.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

The dashboards we have set for the University of North Florida for each of the ten metrics appear below.

METRICS	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
1. Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in U.S. 1-Year After Graduation	69%	71%	73%	74%	75%
2. Median Wages of Bachelor's Graduates Employed Full-time in Florida 1-Year After Graduation	\$34,200	\$34,681	\$35,169	\$35,664	\$36,166
3. Average Cost per Bachelor's Degree	\$29,350	\$28,945	\$28,546	\$28,152	\$27,764
4. FTIC 6-year Graduation Rate	49%	50%	50%	51%	52%
5. Academic Progress Rate	76%	78%	79%	80%	81%
6. University Access Rate	36%	36%	37%	37%	38%
7. Bachelor's Degrees Awarded Within Programs of Strategic Emphasis	45%	45%	46%	47%	48%
8. Graduate Degrees Awarded Within Programs of Strategic Emphasis	51%	51%	53%	55%	57%
9. Percent of Bachelor's Degrees Without Excess Hours	71%	72%	73%	74%	75%
10. Percent of Course Sections Offered via Distance and Blended Learning	9%	11%	13%	15%	17%

Component of the 2015-2016 LBR



**State University System
Education and General
2014-2015 Performance Funding Model (10-Metrics)
Reporting Template
Justification Form**

University:	University of South Florida System
Amount Allocated:	\$22,273,322

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. Description *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

For USF, the awarded performance funds are to be utilized to promote its 2013-2018 Strategic Plan and related Performance and Accountability matrix. Within that matrix, several targets directly correlate to the 10-metric funding model criterion. Therefore, the funding will be directed to specific initiatives or areas of targeted improvement to positively impact the achievement of the milestones within our strategic plan such as retention and graduation rates, merit-based financial aid, faculty in support of STEM and strategic areas of emphasis, to support the planned growth of funded research with postdoctoral appointees, and student career access and support.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

Investments were made to achieve targeted outcomes for 2014/15 which directly correlate to several of the 10-metrics USF is accountable towards, as follows:

1. Investment made in incremental Financial Aid

- a. 14/15 Targeted Outcomes include:
 - i. 60% University Access Rate
 - ii. 37% Undergraduate students receiving Pell Grants
- b. Performance Metrics addressed include:
 - i. #3, Average cost per Bachelor's degree
 - ii. #6, University Access Rate

2. Investment Made for Faculty in Areas of Strategic Emphasis

- a. 14/15 Targeted Outcomes include:
 - i. Student to faculty ratio of 24-to-1
 - ii. Baccalaureate degrees in STEM of 26%
 - iii. Baccalaureate degrees in Areas of Strategic Emphasis of 55%
- b. Performance Metrics addressed include:
 - i. #7, Baccalaureate degrees in Areas of Strategic Emphasis
 - ii. #8, Graduate degrees in Areas of Strategic Emphasis
 - iii. #10, Number of Post-Doctoral Appointees

3. Investment Made for Academic Support staff and Career Services

- a. 14/15 Targeted Outcomes include:
 - i. Full-time Freshman retention rate of 90%
 - ii. Academic Progress Rate (2nd yr. retention w/GPA>2.0) 86%
 - iii. 6-year Graduation Rate of 59%
- b. Performance Metrics addressed include:
 - i. #4, 6-year Graduation Rate
 - ii. #5, Academic Progress Rate



State University System Efficiencies

Universities were requested to provide an update on efficiencies they have completed, undertaken or are in the process of initiating.

The following university summaries highlight various initiatives; however, the following provide some examples;

Completed Efficiencies;

- Implemented document repository and online approval process for third year and tenure/promotion review along with sabbatical application review. Online system resulted in savings of approximately \$50,000 and approximately 100 hours in administrative time - FIU;
- Developed a no-cost self-op electronic imaging/distribution system for purchasing documents. Addition saves over a half million printed pages annually and increases efficiencies while providing numerous ad-hoc reporting capabilities - FAU;
- Entered into \$12.2 M energy savings contract to institute the following measures: partial steam decentralization, improve the efficiency of the chilled water plant, energy management control and solar thermal heating - FAMU;
- Completed deployment of a GPS based tracking system for fleet vehicles; resulting in a 10% reduction in fleet fuel costs - UNF;
- Implemented robust property control system for the allocation and tracking of electronic property equipment - FGCU;
- Utilized "cloud" services to reduce costs of on-premise services. Projects include Microsoft Office 365, Box.net for storage and file sharing and migration to Canvas (university's hosted learning management system) - USF;
- Instituted the digitization of records for storage of internal records to reduce the amount of space and maintenance required for paper files - FSU;
- Formalized consortium with various institutions to develop best practices for collaborating on academic and administrative projects aimed at broadening academic opportunities for students and enhancing operational activities throughout the campuses with minimal costs - NCF

2015-2016 LBR

- Saved over \$4 M in energy costs by generating electricity through the campus combined heat and power plant, on-going commissioning and automation management, and capital replacement – UCF;
- Implemented the Oracle PeopleSoft Benefits Administration module which better manages eligibility, enrollment, and on-going maintenance of benefit plans for university employees – UF;
- Installed Light Emitting Diode (LED) to replace existing fluorescent lights, to replace high intensity discharge (HID) lamps, and to replace existing metal halide – UWF;
- Implemented a high efficiency/low energy lightening system in the Innovation, Science and Technology Building – FPU;

On-going efficiencies and/or efficiencies currently underway:

- Administering negotiations for the selection of specialty advisors; i.e., the monetization of the lease of the University Commons facility;
- Implementing electronic solutions to make proctored distance learning more efficient while reducing errors and delays;
- Continuing implementations of Campus Master Plan policies that maximize efficient land use, promote cost-effective forms of transportation such as buses, bicycling and walking, as well as water conservation through tree preservation, proper plant selection and xeriscaping where feasible;
- Reducing energy consumption and food waste in campus dining halls;
- Revamping business processes including vendor payments with a consequent savings in personnel costs while raising service levels;
- Expanding the availability of textbooks for the rental program to provide students of up to 50% of new textbooks;
- Increasing the average classroom size, while being cognizant of academic needs and certain classes that have limits on the faculty to student ratio;
- Implementing a space inventory software system which allows academic space to be centrally managed and efficiently utilized;
- Implementing remote deposit service online systems which allow for immediate deposit of checks for quicker availability of funds, maximization of interest earned and reduced courier costs;
- Digitization of records, including asbestos surveys and abatements, respirator fit tests, and hazardous waste manifests, to improve access to records, enhance regulatory compliance, improve efficiency of data searches, and optimize use of physical space;
- Renegotiating campus-wide contracts with lower overhead percentage/profits;
- Eliminating academic and university support positions to preserve faculty instructional time and effort.

2015-2016 LBR



Florida A&M University Efficiencies August, 2014

I. Identify academic & administrative efficiency initiatives that are continuing or have been implemented during the past year.

Suspend Low Productivity Programs: Update

In FY 2010-11, the Division of Academic Affairs conducted an intensive productivity study of all academic degree programs at the University. As part of this activity, including discussions with deans and input from faculty, 23 academic degree programs were terminated and one degree program suspended by the Board of Trustees. The teachout for these programs is now complete for all programs. Resources left after budget cuts are being utilized to strengthen remaining programs.

Initiate Distance Learning Partnership – Update

The University currently offers three online graduate degrees. The three distance learning degree programs are as follows: Masters in Business Administration, Masters in Public Health and Masters in Nursing. Students are admitted into the programs by cohorts at the beginning of Fall and/or Spring semesters. The University currently offers sixteen undergraduate courses. The University is developing and implementing marketing strategies for the online program in-house.

Examine Institutes and Centers – Update

The University is continuing its review all the Institutes and Centers to determine if state funds are being utilized in the most effective manner to meet the mission of the institution.

Transformation through Technology Enhancements Project - Update

To improve the monitoring, tracking, and management of procurement contracts, the following enhancements were made:

1. Web Procedures were developed for on-site and desk-top monitoring and made available to Departments.
2. The process for purchasing services under \$5,000 was streamlined using PeopleSoft system.
3. Web-Based Contract Tracking System is operational and being used frequently.

4. Implementation of eProcurement/eMarket software which allows better exploration of available products, services, and prices.

5. P-Card Module now operational in the PeopleSoft system

Efforts continue for enhancing the procure-to-pay process. A contract management program is being implemented to improve the monitoring, tracking and management of procurement contracts. Training for procurement staff, as well as departmental personnel will occur. The State of Florida Department of Finance will train procurement staff on best practices in Contract Management and the procurement staff will train the departments in phases.

The use of the ImageNow software is being expanded throughout the campus. The expanded usage has resulted in improvements in document flows, reduced turnaround time for documents, and a reduction in paper usage.

Energy Savings - Update

In April 2012, FAMU entered into a \$ 12.24 million energy savings contract with Siemens Industry Inc. to institute the following measures:

1. *Partial Steam Decentralization* by installing individual boilers in selected buildings and shutting down the Steam Plant from May through October every year;
2. *Improving the efficiency of the Chilled Water Plant* by adding tighter controls to match the output of the plant with the demand;
3. *Energy Management Control* by automatically controlling and scheduling the temperatures in selected buildings to minimize energy consumption; and
- 4: *Solar Thermal Heating* for water for the Gaither Swimming Pool and the Student Recreation Center.

The project has been completed and will benefit the University in the following ways:

- Over \$1 million in annual energy savings;
- No upfront capital was required from state resources
- Significantly improved reliability of the campus heating, ventilating, and air-conditioning (HVAC) system;
- Improved temperature control and comfort for building occupants;
- Replaced aging and obsolete HVAC equipment;
- Improved opportunities for preventive maintenance; and
- Promotion of the University's sustainability efforts.

II. Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

The FAMU Board of Trustees adopted an Energy Policy, in April 2013, to further promote energy efficiency. The policy is in the initial stages of implementation.



Florida Atlantic University Efficiencies August, 2014

I. Identify academic & administrative efficiency initiatives that are continuing or have been implemented during the past year.

- Documented cost savings of \$2,755,637 over “state contract” sources last year from shared services initiatives.
- Established a Master Builder’s Risk Insurance Program as part of the SUS shared services initiative. Savings over the past four years are estimated at \$1.4M, including three new projects added last year.
- Energy Services Company (ESCO) contracts addressed increased efficiency in the areas of lighting, cooling, metering, pumps and fans. A total of 3 projects are slated to save \$3.5M in energy costs.
- Developed a no-cost self-op Electronic Imaging/Distribution System for Purchasing documents. This addition saves over a half million printed pages annually and increases efficiencies while providing numerous ad-hoc reporting capabilities. We believe this unique home-grown interface to be second to none within the SUS.
- Bundling of the Software Licensing Program to provide consistent costs each year, a single expiration date, reduced license costs and free tech support and updates for several colleges on campus.
- Sales tax recovery (owner contractor) program provided a savings of \$282,000 on \$4.7M of qualified expenditures in FY14.
- Outsourced food operations at our University School to enhance efficiency and variety.
- Designed and implemented on-line benefits orientation program for OPS employees eligible for medical benefits under the AFFORDABLE CARE ACT (ACA).
- Secured online ACH/Direct Deposit Enrollment form was rolled out to provide more efficiency in obtaining the banking information from our vendors and non-employees.
- FAU implemented online Public Auctions for surplus property during fiscal year 2014 which significantly contributed to an increase in revenues of \$50,000 from fiscal year 2013.
- Implemented Remote Deposit Service Online. These scanners allow for immediate deposit of checks which results in a quicker availability of funds, maximization of interest earned and reduced courier costs.
- Competitively solicited and negotiated contracts for 5-yr terms for grounds, custodial services, and maintenance of the water treatment plant at the HBOI campus, which resulted in substantial annual savings.
- Researched government trash-hauling contracts on which to piggyback and contracted with Waste Management (under its agreement with a Florida school board).
- Initiated a campus-wide recycling initiative to increase the amount of recycled material collected. Reduces the Solid Waste Assessment Fee paid to Palm Beach County as material sent to the recycling collection facility is free and, therefore, not deposited into a county landfill.
- Successfully diverted 371,577 bottles from the landfill this past year due to the installation of the Hydro filling stations installed in Housing buildings.
- Eliminated the in-house custodial staff by outsourcing the balance of campus-wide cleaning responsibilities to the existing outside contractor whose cost-per-square foot resulted in significantly less overall costs than that of maintaining an in-house FAU cleaning crew.
- EH&S and OSUA are creating efficiencies through a “Transformation through Technology Enhancement.” The project is improving our fire alarm monitoring system by eliminating telephone lines and replacing them with IP-based network lines. The end product will significantly improve the reception of signals and realize savings of approximately \$50,000 per year.
- A credit card realignment program which reduced risk exposure in the pCard Program.
- Rebid banking services which netted a reduction in fees of 50% and an increase in revenue of 100%.

II. Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

- Automating the on-campus fuel-dispensing system to allow users to digitally provide vehicle/user identification in order to obtain fuel. Savings will be realized by eliminating staff previously required to man the fuel pumps and the new system’s more accurate record of dispensed fuel. Web-based process allowing users to see their account on line in real time to better manage their fuel consumption/costs.
- FAU, in concert with other SUS institutions, is in the process of selecting vendors for an SUS Disaster Services Contract, which will allow institutions to respond effectively in the aftermath of hurricanes and other natural or man-made events affecting SUS institutions.
- Began to administer negotiations for the selection of specialty advisors; i.e., the monetization of the lease of the University Commons facility.
- Investigating the use of a special ghost card to pay FAU’s primary electrical utility provider. It is anticipated that this additional pCard volume will propel FAU into a higher rebate tier.



State University System Efficiencies

University: Florida Gulf Coast University

Installation of Energy Recovery Ventilators: The installation of the energy recovery units in coordination with the solar field continues to provide on-going energy savings, as well as mitigating the tonnage requirements of the chiller plant. This project was started last year, and two added units were put into operation

Retrofitting of LED lighting: Current lighting fixtures on campus are being retrofitted to LED lighting. Beyond better performance, these new lights will provide energy savings annually. It is estimated that the payback period on this system is less than seven years.

Web-Based Building Access Program: The University has converted its card based building access system to a web based provider. This allows tremendous efficiencies as request for building access can now be granted electronically, and allow staff a quick response time and a reduction in labor costs for all involved.

Work Management System: The work management system is being converted to a new provider, which will allow for a paperless workflow. All work requests and responses will be managed electronically, saving on time for printing, paper, filing and transmission of documents on campus. Currently, there are over ten thousand processed transactions in the system, and going forward all will be managed in a paperless environment.

Property Control Procedures: With the advent of tablets and robust portable electronics, the university has implemented a robust system for the allocation and tracking of "attractive property" in order to protect against loss.

Increased Advising: The university remains committed to improving the student to advisor ratio, and has plans to hire additional advisors in order to improve the ratio and ultimately the retention rate amongst students.



State University System Efficiencies

Florida International University

FY 2013-2014 Efficiencies – Completed

- Human Resources Online Initiatives: In March 2014, the ePerformance module of PeopleSoft HR was expanded to include over 1,000 AFSCME employees and their 400 managers. This expansion has provided paperless and time-saving processes for employee performance management, resulting in estimated savings of approximately \$68,000. Additionally, webinars were instituted as the primary form of university-wide distance training for Human Resources, resulting in savings of over \$18,000.
- Online Reference Center: Implementation of online reference center for both job finalists and faculty applicants along with an online reference center for graduate school applicants. Automatically notifies references for each individual resulting in savings of over \$100,000 and time savings of about 2,500 hours for the approximately 500 annual hires and over 12,000 graduate applicants.
- Online faculty career system: Implementation of a document repository and online approval process for third year and tenure/promotion review along with sabbatical application review. Online system resulted in savings of approximately \$50,000 and approximately 100 hours in administrative time.
- Expansion of online course availability: Increased online courses allow the University to serve more students without further constraining space resources while also reducing the carbon footprint.
- Establishment of Master Contracts: Established Master Contracts with 39 small trade businesses; negotiated competitive rates and reduced turnaround time for projects.

FY 2013-2014 Efficiencies - Underway/Ongoing

- Energy Performance: Ongoing energy conservation plan across all campuses has resulted in millions of dollars in cost avoidance annually. Efforts include real-time monitoring for electricity, chilled water automation, campus wide metering, retrofitting light fixtures with energy saving lights and installing motion- sensor switches in all classrooms, offices and restrooms.
- PeopleSoft Financials 9.2 Upgrade: Addresses challenges encountered in daily operational use through delivered workflow, dashboards and enhancements in the financials and grants modules.
- Invoice Imaging: Uses the latest technologies to scan over 40,000 invoices and automatically populate invoice data into the ImageNow and PantherSoft systems for approval and review.
- Fall Semester Traffic Plan: The Public Safety Department has created partnerships with local police departments and Miami-Dade County to better control traffic flow and reduce the need for police staffing to control traffic. This is expected to reduce overtime costs by approximately \$100,000.

FY 2014-2015 Efficiencies - Planned

- Term Redesign: Add four additional term starts for online and onsite programs; solidify a term structure that efficiently manages graduate programs term dates, graduations and admissions processing.
- Non-Degree & Dual Enrollment Application Processing: Institute a more efficient admissions application process to allow for a more accurate tracking, transition and retention of these students as they move to degree seeking programs.
- Golden Panther Express: Increase the number of bus routes provided to the FIU community between campuses while reducing costs of fueling and gas emissions to the environment. Anticipate shuttle bus fuel reduction of at least 6%, and a reduction in shuttle size during off peak times.
- Extension of online faculty career system: Implement a centralized system that will leverage existing data in other systems to create and evaluate faculty activity and productivity. Eliminate paper evaluation processes for faculty and create time saving processes for faculty activity reporting and evaluation such as annual evaluation, third year review, tenure and promotion and sustained performance reviews.



Florida Polytechnic University Efficiencies August 2014

I. Identify academic & administrative efficiency initiatives that are continuing or have been implemented during the past year.

Florida Polytechnic University is a lean organization. The University continues to utilize a shared service agreement with the University of Florida for administrative services. We will open our doors to students in August 2014. During our first year of full operations, we will continue to identify ways to be more efficient.

II. Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

Florida Polytechnic University has just completed the construction of its iconic Innovation, Science & Technology (IST) building. In addition, the Wellness Center Phase I and the Student Housing will be completed in the next couple of weeks.

Florida Polytechnic University buildings have been planned and designed to use technology to allow for efficiencies and potential savings. As we begin our first year of full operations, the University will begin to collect data to quantify savings. Over the past year we have implemented the following:

Innovation, Science and Technology Building

1. Daylight harvesting systems in classrooms and laboratories.
2. Occupancy sensors for all rooms and public spaces.
3. Daylight supplementation of larger spaces.
4. Shading devices for the building.
5. Shades which track with the sun, for the skylight.
6. Low-E double glazing at the perimeter.
7. High efficiency/ low energy use lighting throughout the building.
8. High efficiency traction elevators.
9. Polished concrete floors for public spaces.
10. Automatic controllers for all toilet facilities.

Florida Polytechnic University Efficiencies

Page 2

11. Use of roof for outdoor classroom and pre-function gathering space.
12. Large gathering space for emergency bunker.
13. High wind design for systems and building envelope.
14. High efficiency chilled water cooling.
15. State of the art fiber-fed Information Technology.

Wellness Center Phase I

1. Occupancy sensors for all rooms and public spaces.
2. Daylight supplementation of larger spaces.
3. Shading devices for the building.
4. High impact double glazing at the perimeter.
5. High efficiency chilled water cooling.
6. Polished concrete floors for public spaces.
7. Automatic controllers for all toilet facilities.
8. High wind design for systems and building envelope.
9. State of the art fiber-fed Information Technology.

Resident Housing

1. Daylight supplementation of larger spaces.
2. Shading devices for the building.
3. High efficiency chilled water cooling.
4. Automatic controllers for all toilet facilities.
5. High wind design for systems and building envelope.
6. State of the art fiber-fed Information Technology.
7. Wireless technology for all rooms.

Campus Control Center

1. High efficiency magnetic chillers.
2. Supplemental redundancy for chillers.
3. Remote monitoring and controls for all campus systems, in the Network Operating Center.
4. High efficiency chilled water cooling.
5. State of the art water cooling tower.
6. Separate unit for the data center cooling, to accommodate heat gain.
7. High wind design for systems and building envelope.
8. State of the art fiber-fed Information Technology.

Florida Polytechnic University Efficiencies

Page 3

Site

1. Collection and reuse of storm waters for irrigation.
2. Low energy LED lighting throughout the campus.
3. Cellular visitor parking kiosks with cell phone connectivity wireless.
4. Emergency phones with cell phone connectivity wireless.
5. Natural Florida vegetation and selective removal of existing undergrowth.
6. Low emissivity irrigation systems, drip irrigation.
7. (Future grey water supplementation of ponds.)

Admissions Building

1. Low energy point of use lighting.
2. Natural daylighting to supplement energy use.
3. Low energy use cooling system.
4. Open data room to disperse heat gain.
5. High wind design for systems and building envelope.
6. State of the art fiber-fed Information Technology.



Florida State University Efficiencies August, 2014

For the second year in a row, US News & World Report has ranked Florida State University as the most efficient university in the country in delivering a quality education. Below, please find a small sample of implemented efficiencies and others currently under review.

I. Identify academic & administrative efficiency initiatives that are continuing or have been implemented during the past year.

The campus continues to focus on opportunities to reduce overhead expenses.

Departments continue to increase electronic communications and interactive websites for more effective messaging as well as reduced cost of printing and mailing.

Many offices are converting manual processes to secure on-line formats.

Many departments are instituting the digitization of records for storage of internal records to reduce the amount of space and maintenance required for paper files.

Identify and pursue implementation of efficiencies for Seminole Golf Club operations that preserve the quality of the course, including course maintenance, pricing, the pro shop, and the restaurant.

II. Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

Consolidate various decentralized services and resources under a centralized model.

Review and enhance utility optimization and efficiency throughout campus.

Move to a stipend model to enable employees to obtain cellular and data services required to support university operations.

Academic departments will continue to seek new funding opportunities and establish new relationships with funding agencies and international collaborators in order to gain more soft money contracts and reduce reliance on state-appropriated support.

Additional academic departments are transitioning graduate degree program applications to an online format in order to streamline the application process, cut down on labor needed to respond to queries, and reduce processing time.



New College of Florida Efficiencies 2013-14

New College continually looks for new efficiency opportunities and frequently reviews current operations and procedures in an effort to improve campus wide operations. A prime example of a long standing operational efficiency involves sharing operating costs for the following academic and administrative support functions with USF Sarasota-Manatee, whose campus is immediately adjacent to the College's campus: Jane Bancroft Cook Library, Student Counseling and Wellness Center, Police Services, and Campus Bookstore Services. In another shared services function, the College and FSU Ringling Museum of Art have co-located their chiller plants in the same facility, providing each other with back up chilled water capacity and other benefits. Also, the College contracts with FSU for Building Code Administration Services. **Examples of recent efficiencies achieved, underway or planned during FY 2013-14 include:**

Institutional Collaboration

- ✓ Top leaders at Eckerd College, FSU Ringling Museum of Art, Ringling College of Art and Design, State College of Florida, the University of South Florida, Sarasota-Manatee and New College of Florida have formalized a consortium to consider ways these institutions might collaborate on various academic and administrative projects aimed at broadening academic opportunities for students, inventorying administrative and academic strengths of the various institutions and identifying possible areas where shared services or resources may enhance effectiveness as well as efficiencies. During 2014-15, the group (The Consortium of Colleges on the Cultural Coast) plans to actively involve their academic and administrative leaders in working together on projects including, but not limited to, coordinating shared training opportunities in areas such as Title IX and discrimination, fraud detection & prevention, and law enforcement "active shooter" training. The group also plans to focus on emergency response planning/communications, collaboration on international admissions and study abroad opportunities, student leadership training, and student health & wellness and campus life programming opportunities.

Energy and Facilities Management

- ✓ Progress continues to be made in reducing consumption of purchased utilities (electricity, natural gas, water and sewer) despite increasing per unit costs. As funds permit, we continue to add buildings to our electronic campus-wide energy management system and retrofit buildings with more efficient HVAC, lighting, window and roof systems.
- ✓ Based on background provided in a Florida Tax Watch Briefing on a federal tax incentive program (Section 179D) for implementing energy efficiency enhancements in new buildings or through retrofitting old buildings plus previous work accomplished by UF, FSU, USF and UCF, the College worked with its contractors to apply for federal

rebates. The projected net share of refunds the College hopes to receive totals in excess of \$60,000.

- ✓ Continued to take advantage of owner direct purchases for equipment and materials supporting capital construction projects, yielding sales tax savings of \$25,630 in FY 13-14.
- ✓ Maintenance staff is now using tablets to communicate in the field with the work order system, improving communication accuracy and timeliness in responding to maintenance requests.
- ✓ In August 2014 a new trash and recycling program will be implemented campus wide that will increase the amount of recyclables generated and reduce the amount of staff labor needed to manage the program. Annual savings in vendor costs alone are projected to total over \$6,000.
- ✓ Changed the campus flooring standard from vinyl composition tile which requires regular stripping and waxing to maintain to a no wax vinyl plank flooring material designed with a much lower life cycle maintenance cost.

Business Operations and Outsourced Services

- ✓ Reports from the shared Barnes & Noble bookstore contract managed by USF Sarasota-Manatee indicate students' increasing use of textbook rentals and digital textbooks during the academic year increased from 17.8% of total dollar sales in academic year 2012-13 to 33.7% of total dollar sales in academic year 2013-14, yielding students significant savings when compared to purchases of new and used textbooks.
- ✓ Increased on-line tuition & fee payments by 8% over the prior year. This improved cash flow and lessened the collections work load.
- ✓ Completed competitive selection of a new food service provider aimed at improved service delivery, improved food quality and significant new capital investment to enhance dining facilities.
- ✓ Streamlined processes to collect demographic and financial data used in the development of Admissions and Financial Aid reports, resulting in staff time savings totaling over 500 hrs. annually.
- ✓ Restructured advertising and marketing contracts and brought certain advertising design services in-house saving an estimated \$21,000 annually.
- ✓ Took advantage of a co-op agreement to restructure campus copier services, lowering costs and providing enhanced services.
- ✓ Implemented a car sharing program allowing students the flexibility and freedom a car provides while eliminating the financial burden of owning a car. Drivers as young as 18 can sign up online, reserve a car and use it for as little as \$4.95 per hour.

Automation

- ✓ Created an electronic transcript and implemented electronic delivery of transcripts to reduce processing and staff time, saving at least 100 labor hours annually.
- ✓ Continued to convert items in Admission's communication plan for prospective students from print mail to e-mail, resulting in additional postage savings.
- ✓ Implemented online review of student application files to increase staff productivity and enhance protection of confidential data
- ✓ Installed a new automated campus housing room assignment system, reducing the amount of staff time needed for such tasks and providing students a more convenient way to submit room assignment requests.



University of Central University Efficiencies August 2014

Identify efficiencies made, underway, or planned, including specific improvements or cost savings.

UCF saved \$4.2 million in energy costs in 2013/14 by generating electricity through the campus combined heat and power plant, on-going commissioning and automation management (processes to ensure operational optimization), and capital replacement. Since its base year of 2005/06 source energy has been reduced by 37 percent yielding cost savings of over \$13.5 million. UCF participated in Duke Energy's Energy Cost Recovery rebate program, yielding \$180,000 in electrical utility rebates. All Metal Halide lighting (175 watts) in two garages was replaced with 90-watt LED lights, providing the potential to save the university 45 percent in energy costs for these structures.

UCF's landscape and natural resource department saved the university more than \$140,000 by providing in-house compliance services for wetland mitigation and storm water management required by St. Johns River Water Management District and Department of Environmental Protection.

An estimated \$3.1 million was saved by directing departments to best procurement methods and emphasizing the use of pre-existing contracts, direct owner purchase program and principles of competition. UCF awarded the State University System shared services' multimedia equipment contract resulting in an anticipated average discount of over 18 percent. UCF alone anticipates saving \$1.0 million over a two-year period. Purchasing Card expenditures were increased by \$4.5 million, a 15 percent year-over-year increase. This eliminated the issuance of ACH and check payments and allowed vendors to receive their funds more efficiently, as well as increasing rebates to the university by \$72,000.

UCF's tax director served as a member of the National Association of College and University Business Officers (NACUBO) Tax Council, presenting at two conferences and assisting with a webcast on the tax ramifications of the U.S. House Ways and Means Committee tax reform draft. He was also asked to travel to Washington D.C. to meet with Senate Finance Committee staff to discuss the IRS Form 1098-T, Tuition Statement. During the year UCF obtained a waiver from the IRS of \$58,000 in proposed tax penalties related to Form 1098-T by effectively demonstrating compliance with the tax code. NACUBO adopted UCF's response to the IRS as a template for all NACUBO members to use when responding to similar notices received by their university.

UCF redesigned reports for the Division of Retirement which ensured proper service credit for UCF employees and reduced the number of errors. Also, by adjusting the dates for which departments must pay higher DROP contribution rates UCF saved \$87,000 in participant's pay outs.

A new six and a half year student transportation contract began in January 2014. Total savings of \$2.4 million are expected over the contract term.

Component of the 2015-2016 LBR



**University of Florida
Efficiencies
August, 2014**

I. Identify academic & administrative efficiency initiatives that are continuing or have been implemented during the past year.

The response of the University of Florida is presented by its different divisions.

Academic Affairs

Online promotion and tenure. This project is now being implemented campus-wide. Since submitted on the UF list of efficiencies last year, this project has been recognized for the following two awards:

- 1) The Prudential Productivity Award** - A joint effort of the Florida TaxWatch, the Florida Council of 100, and the State of Florida, the Prudential Productivity Awards are presented annually to honor state government employees throughout Florida who have significantly increased productivity in delivering state services and products.
- 2) An Innovation Award from the national College and University Professional Association of Human Resources (CUPA)** - CUPA is the national organization for human resources within higher education. UF was only one of three institutions to be presented with an annual HR Innovation award. This award recognizes innovative thinking in higher education HR related to the institution's development of a new and innovative HR model that can be easily adapted and emulated on other campuses.

Academic Activities System redesign and automation of faculty activity reporting. A new Academic Activities reporting system (AAR) is near completion, with implementation scheduled for Fall 2014. This system will create a more streamlined approach to the collection and reporting of

instructional activities for faculty. By capturing information directly from administrative systems, units will avoid redundancy in data entry and improve the accuracy of both state and federal grant reporting.

The ground floor of the Marston Science Library has been renovated into a 26,000 square foot state-of-the-art student study center that will open in August. This was done by consolidating library materials into the Smathers Library and into a SUS shared library storage facility located in Gainesville.

Financial Office

Automation of Budget System

Implementation of a new budget system. This single system allows units to review prior year budgets, revenues, and expenses, making it easier to project their revenues and expenses for the upcoming budget year. The old system only handled state appropriations due to that system's limitations and all other funds had to be reported using spreadsheets which lent itself to inaccurate reporting of revenues and expenses resulting in many hours of manual adjustments to correct the data.

Administrative Support to Florida Polytechnic University

In its continued efforts to improve administrative efficiencies throughout the State University System, the University of Florida continues to provide administrative support to Florida Polytechnic University during fiscal year 2013-14. The University of Florida provides "back office" support for all human resources, payroll, accounting and reporting, banking, collections, purchasing, Pcard, disbursement, asset management, and construction accounting services for Florida Polytechnic University and its Foundation. This support has enabled Florida Polytechnic to focus on getting its campus up and running and to meet the legislative mandates established for it.

Direct Deposits

Steps have been taken to automate the processing of direct deposit information for new employees. The process allows the new employee to enter the information during the onboarding (hiring) process. This process helps maintain a high level of participation in electronic payroll deposits and minimizes creating paper checks. An automated process was also developed to inactivate direct deposits for employees twelve months after termination. Both of these processes

were previously manual and required several staff and numerous hours of time on a daily basis to complete.

Office of Human Resources

Benefits Administration. In order to better manage eligibility, enrollment, and on-going maintenance of benefit plans for employees, UF implemented the Oracle PeopleSoft Benefits Administration (Ben Admin) module in May 2014. (The BenAdmin project launched in July 2013.) This module automates benefits eligibility and termination processing as well as reduces manual and labor-intensive processes previously required. In addition to improving how benefits are administered, the BenAdmin project also provides self-service functionality for UF-sponsored benefits (new enrollment, maintenance for qualifying events, and during the open enrollment period).

Information Technology

- Starting in July 2013, UFIT deployed HiPerGator to consolidate high-performance computing and data analytics on equipment operated in a new, secure, energy efficient data center. Faculty throughout the University acquired shares of this infrastructure totaling \$796,000. These funds would otherwise have been spent buying equipment like desktop-computer-farms placed on racks in labs thereby increasing management overhead, security risks, and making energy management of buildings difficult and sometimes impossible.
- End user software licensing costs in the amount of \$5,407,797 were avoided during FY 2013-14. This was achieved through the negotiation of software licenses rather than direct purchases at standard discounted prices for education.
- Network staff was reorganized to minimize mid-level managers and save \$90,000 per year.
- A redundant wireless network system was implemented that will save \$55,000 in additional license costs per year. Replacement battery trays for distributed backup power systems are built with an in-house process that saves \$60,000 per year.
- The “Virtualize First” approach used when deploying new systems/services resulted in a cost avoidance of over ~\$700,000. About 96% of the enterprise systems at UF are virtualized.

- Outsourced student email to Microsoft's Office365 cloud service improved student email user experience and efficiency, while reducing recurring costs to near zero, and avoiding ongoing upgrade costs of approximately \$400,000 every four years.
- Microsoft's OneDrive was implemented for faculty, staff, and students providing a free but high-value and secure cloud storage service. This avoided the costs to provide a similar service internally and avoids insecure services like Dropbox. Savings will likely reach well over \$1,000,000 in the coming years.
- A database hosting service allowed consolidation of 43 MS SQL databases resulting in a cost avoidance of nearly \$1,000,000 in licensing fees.
- A VMWare 5-year Enterprise Usage Agreement was negotiated resulting in a total savings of \$1,064,000 over five years (or, \$212,800/year) with significant savings in year six and beyond.
- An Online Promotion and Tenure workflow system for the faculty annual promotion and tenure process was implemented. This project focused on time and energy savings and improves sustainability by reducing the use of paper. This resulted in paper savings of 448,500 pages @ \$0.15 each totaling \$67,275 in paper savings. Paper review, format, and copying that took an average of ten hours per week per packet for four weeks is now taking an average two hours per week per packet for four weeks generating \$176,640 in staffing savings.
- myInvestiGator was implemented to manage research project portfolios, project details and transactions details for over 7,000 active research projects. Since the University of Florida launched the new online tool to track its nearly \$700 million in annual research funding, biologists, historians, geneticists and philosophers can be more focused on research. Before myInvestiGator, staff would have to prepare 168,000 tailored reports per year for faculty Principal Investigators. The salary to produce the reports was approximately \$5,040,000.
- An automated process was developed and implemented in myUFL that allows non-UF employees access to training. The automation eliminated the need for manual completion of an electronic form. This now allows certain large groups of UF-affiliated users to have automatic access to training enrollment and completion. By switching from electronic forms to an automated solution, Human Resource staff saved 463 hours a year processing forms.

- Standardized desktop configurations were adopted, allowing for volume discounts resulting in savings of \$1,000,025.

Division of Business Affairs

Business Services

- Completed UF Waste Stream contract for a campus-wide waste solution.
- Coordinated installation of credit card and Gator 1 Card acceptance readers on campus vending machines. All Pepsi vending machines now utilize the Verizon wireless network for a more efficient transaction success rate.
- Awarded \$10,000 grants to four winners of Pepsi's Gator Green Contest for their ideas on how to engage UF students in community service activities.

Gator Dining

- Enhanced the residential dining experience by expanding the number of secondary retail locations accepting meal plan swipes. Meal plans are now accepted at ten locations across campus including the two residential dining centers and several national brand locations.
- For the second year in a row, Gator Dining and Pepsi partnered with Dr Pepper for a spring scholarship text-to-win promotion that provided three \$1,000 scholarships and one \$4,000 scholarship to UF students.
- UF/Gator Dining came in first place as the Most Vegan-Friendly Large American College in the United States; a competition sponsored by PETA2.com.
- Rawlings Subway and P.O.D. Market were featured in On Campus Hospitality in the September 2013 issue.
- Moe's @ UF was featured in the November 2013 issue of QSR Magazine.
- Gator Dining Services implemented a "Healthy for Life™" health and wellness program in the dining halls. The program strives to enable, educate, encourage and engage students on healthy eating options in campus dining facilities to build a stronger, healthier and well-informed community.
- This was the first year to introduce a Marching Band Meal Plan to 350 members. They will have an opportunity to purchase a 25 Block Meal Plan with \$50 Flex Bucks, and a Saturday, home game catered meal package for the 2014 season.

- Gator Dining began composting pre-consumer food waste at The Fresh Food Company, Classic Fare Catering, and the Arredondo Room in February 2013 and Gator Corner in March 2013, and began composting pre-consumer waste at all locations in the Reitz Union in February 2013. Currently diverting approximately one ton of food waste per day from the landfill between all locations.
- Awarded the 'First Runner Up' for an AASHE (Association for the Advancement of Sustainability in Higher Education) "Campus Sustainability Case Study Award" based on the initiative to eliminate foam products and plastic bags from dining facilities.
- Won the University of Florida's "Champions for Change Award" in the Health and Wellness category for our Healthy for Life™ program.
- Striving to add new, local vendors when feasible. Added a new local vendor to our convenience stores, Hyppo Gourmet Ice Pops, out of St. Augustine, Florida.
- Partnered with Alachua School system and tabled food from local farms for elementary school students.
- Business Services Division added two new dishwashers. Water usage for one was reduced by 1/3 and the other by 2/3.

Apple Service Center

- Developed billing reconciliation system to better track repairs and billing processes.

ID Card Services

- Continued efforts with Enrollment Management to provide robust and efficient processes to handle the new UF Online cohorts.
- Developed a strategic plan to improve the customer experience focusing on quality, friendliness, and service.

Mail & Document Services

- Increased the volume of U.S. Passport applications approximately 14% by continuing an advertising campaign of Mail, Document, and Passport Services in The Alligator, Campus Talk Magazine, The Gator Locator, Gator Bucks, and Gator Greenbacks.

- Purchased two new mail vehicles to continue the ongoing process of upgrading the mail vehicular fleet to more fuel efficient vehicles.
- Purchased a new hand-held “package tracking” system in order to increase the efficiency of tracking for both departmental and student mail/parcels.
- Offered training seminar to UF departments on Mail Services and cost saving initiatives.

UF Bookstores

- In April 2014, a new contract for UF Bookstores was finalized and signed by the University of Florida and Follett extending the contractual relationship until June 30, 2025 with an automatic 3-year renewal.
- In FY 2013-2014, UF students saved \$1,257,623. The IncludedED program that uses a fee for a textbook was initiated in Fall 2013. The texts are digital and loaded into the university’s Learning Management System, ensuring students have the course materials the first day of class. Total savings to students in this program was \$246,750 (compared to the cost of the text used the previous semester). UF students saved an additional \$1,010,873 by purchasing and selling back their textbooks at UF Bookstores.
 - GEB3373 fall enrollment was 598 students; spring enrollment was 602 students. Each student saved \$174 per text.
 - CHM1083 fall enrollment was 39 students; spring enrollment was 36 students. Each student saved \$110 per text.
 - MAN3025 summer enrollment was 309 students. Each student saved \$100 per text.
 - Students saved \$19,961 on the 1st Day of Class Sale for Fall 2013.
 - Students saved \$247,668 purchasing used texts.
 - Students saved \$570,146 by renting their textbooks.
 - Students received \$174,363 through book buyback.

Transportation and Parking Services

- TAPS completed lighting retrofit projects in Garages 1, 2 and 3, installing new energy efficient light systems to reduce energy consumption and utility expenses. Estimated savings in both energy consumption and utility expenses are between 30-45%.
- TAPS completed and opened the new bus shelter and resurfaced plaza at the Hub in August 2013.

- TAPS deployed the new cling decal to faculty and staff in May of 2013. This sustainability initiative eliminates the use of plastic display devices and large mailers. The projected savings in postage and plastic is \$50,000 annually.
- Completed an engineering inspection of all garages by Walker Parking Restoration, and continuing TAPS' investment in the Assets Management and Capital Improvement Program to ensure the structural integrity and safe conditions in 13 campus parking garages.
- Completed a faculty and staff customer satisfaction survey in June 2014 following the parking decal renewal period.

Stephen C. O'Connell Center

- Replaced 65 Natatorium lighting ballasts and improved daily scheduling efficiencies. The new lighting ballasts have dimming capability and lighting levels vary based on improved scheduling and "daylight sensors" that will dim the lights based on sunlight levels reaching the pool. There is an expected annual savings of more than \$5,000.

Physical Plant Division

**Original efficiency goal is in italics.*

- *Increase efficiencies in Waste Collection.*
 - We have been reviewing waste collection summer routes on campus by auditing the fullness of containers as they are picked up and will also be auditing routes during the 2014 fall term when the campus is in full operation. We have also been investigating new software that will assist with routing efficiencies and contain GPS-type capabilities in order to track equipment effectiveness. In addition, we will be reworking the recycle yard to assist in more efficient access to different types of recycle containers. This will allow those who dispose of waste more options in how they sort the materials they are disposing of.
- *Conversion of existing waste collection infrastructure to recycling cans to save costs for new bins.*
 - The program to convert outdoor waste receptacles into recycle stations has thus far resulted in 1,003 stand-alone two to three tier trash and recycling bins. This exceeded the original goal of 800 stations by 203 locations.

- *An Invitation to Negotiate has been in process for all waste streams at UF and Shands. This contract will reduce the cost for service as well as meet the university's goal for waste reduction.*
 - The contract with Waste Corporation of America (WCA) started in late 2013 and continues to expand. To date, we have converted all clean mixed paper and cardboard pick up over to their operations. In February 2014 WCA began collecting food waste from three dining locations and transporting it to Watsons Composting. In June of 2014 WCA began collecting waste data via an internal bar coding application. This will give us the ability to adjust collections based on volume and reduce collection costs. In addition, WCA has partnered with Dr. Townsend, a professor in the Department of Environmental Engineering Sciences at UF, to conduct a new waste audit. The results of this audit will be available in early fall of 2014. This data will help us establish direction for future endeavors in our Waste Reduction program.
- *High Performance Work Teams pilots were implemented in three distinct campus situations. These unique groups were formed to work as autonomous units, providing custodial and basic building maintenance services as a team. One team is in an area of high student traffic comprised of many classrooms and offices. A second team is in an area with a high concentration of research related-activities. The third is in a new facility designed for business and professional occupants, known as the Innovation Hub. Overall cost savings have resulted while delivering improved customer service to customers.*
 - The High Performance Work Teams (HPWT) have continued to be successful and have continued to receive accolades about improved response time and the quality of work provided. Consideration is being given to expansion of the program to an additional building group which could begin implementation during the 2014-2015 fiscal year.
- *Chilled Water Plant Optimization. Since 2008 PPD has been implementing an initiative to optimize and better integrate the campus district chilled water system. The system is comprised of ten interconnected plants of varying capacities which produce approximately 119,000,000 ton-hours of chilled water in support of approximately 13,000,000 GSF. Implementation of Direct Digital Control has enabled real-time management of the systems via programmable algorithms. Significant mechanical alterations, upgrades, and renovations were necessary prior to control implementation. Although not complete, this initiative has already resulted in a 17% improvement in plant efficiency (saving approximately \$1,900,000 per*

year). Substantial additional savings are anticipated as control systems are fully installed and the plants are further optimized.

- During FY 2013-2014, Chilled Water operational efficiency improved by 1.65% which increased cost avoidance by \$357,000 from annual cost avoidances recognized in the previous year. As work progresses to upgrade the plants and optimize system operations, including additional commissioning projects, additional improvements in chilled water efficiencies cost avoidances will be obtained. Key focus areas moving forward include: Condenser Water Flow and Cooling Tower Optimization, enhanced Chiller Sequencing, and real-time Chiller Plant Energy Dashboards and infrastructure replacements to extend the life of the equipment.
- *Building Re-commissioning, UF's building re-commissioning program, which was implemented on approximately 23% of campus square footage, was cautiously projected to save \$600,000 annually. The FY2013-2014 annual cost avoidance from this endeavor was \$627,830 with \$3,400,000 in total cost avoidance to date. This process affected mostly building mechanical equipment, reduced electrical consumption by 2.3% and chilled water consumption by 9.2%. Additional cost saving measures are also being implemented including T-12 lighting retrofits with T-8, occupancy sensors to control lighting and/or HVAC systems and replacing low SEER Dx units with higher SEER units.*
 - During FY 2013-2014, initiatives completed included building automation and controls upgrades, HVAC system replacements, and optimization algorithms deployed in buildings to further extend the energy savings potential. Additionally, with the recent division reorganization, the Energy Controls staff will begin focusing on additional technology deployment and utilization to enhance energy savings.

Planning, Design & Construction

- Continuation of the UF LEED Program standards governing all design and construction projects accomplished both "Platinum" and "Gold" certifications in 2013-14 and registration/tracking of an additional 15 projects that will ultimately realize savings in the use of chilled water, power, potable water, sanitary and sewage treatment as well as provide enhanced occupancy qualities.

- Building Information Model (BIM) templates, guidelines and protocols have been established and are actively in use with design and construction teams for major projects. Enhancements to the PD&C SharePoint system have been made to accommodate current and future electronic document storage and retrieval utilizing expanded CSI standards. These processes and improvements will enhance the efficiency of project closeout/facility turn over and provide for optimum access to completed as-built information, O & M manuals, warranties, equipment specifications, etc. Collectively, this will improve the ongoing life cycle operations, maintenance and subsequent renovation of the facilities.
- Continued pursuit of Duke Power rebates expanded in 2013-14 to include E & G projects. This expansion has resulted in a total rebate of \$88,000 from 31 minor projects (projects totaling \$2,000,000 and under).
- Measurement and verification of the LEED certified buildings to track performance, energy consumption and the reduction of CO2 emissions is under development. The resultant consumption/cost reports will be a tool to rate performance, estimate carbon footprint, set investment strategies and verify performance of LEED certified buildings.
- Continuous improvement of the UF Mentor-Protégé Initiative with the Division of Small Business & Vendor Diversity Relations has proven successful in bringing together large business entities to mentor small businesses on process, marketing and financial management. PD&C provides training sessions on Sustainability, contracts, proposal preparation, BIM and document preparation to assist small businesses in the development of their firms.

Small Business & Vendor Diversity Relations

- Utilizes an on-line database for registration of small businesses with UF.
- Utilizes on-line registration system for registering of attendees and exhibitors for Annual Trade Fair & Conference event.
- Uses electronic mailings for notifications regarding workshops, networking sessions and other events hosted by the division.

- Participates in campus recycling program by recycling of paper products, cans and bottles for the office and as part of the university's waste reduction program.
- Instituted use of social media as an on-line platform for advertising, promoting and informing our customer base and various audiences.

Office of Sustainability

- The Office of Sustainability, University Athletic Association, and Waste Corporation of America established a partnership to increase the waste diversion rate inside Ben Hill Griffin Stadium during home football games. As a result, the waste diversion rate increased from 28% to 78% by the last game of the 2013 season, with no increase in core staffing.
- Through a collaboration with the Office of Sustainability, Gator Dining Services and Waste Corporation of America, in early 2014 Gator Corner and Fresh Food Co. began collecting pre- and post-consumer food waste for compost, and the Reitz Union began collecting pre-consumer food waste. As a result, more than 50,000 pounds of food waste have been diverted from the landfill.
- The annual Campus Collection Day saw increased traffic from students, faculty and staff who participated by donating unwanted goods and/or properly disposing of household hazardous waste, electronic waste, and other items.

University Police Department

- The UFPD has been working with its police records management vendor to develop enhancements that would decrease the amount of resources associated with the reproduction and processing of police records mandated for use by other criminal justice agencies. This workload consumed almost an entire FTE and thousands of pages worth of associated paper and ink. Recent enhancements have now enabled the department to fully realize its goal and as a result eliminated a Senior Secretary position within the Records Section of the department and are providing most all copies of documents to other agencies in electronic form. The annual savings from this reduction is approximately \$44,000.
- UFPD has been systematically replacing all of its Ford Crown Victoria marked patrol vehicles with more fuel efficient makes/models. By the end of the 2014 fiscal year UFPD had replaced all but two of these vehicles with the

more fuel efficient Ford Explorer Police Interceptor. It is planned that the final two Ford Crown Victoria cruisers will be replaced in the current fiscal year. Based on the most recent fuel consumption data provided by the manufacturer, the Ford Explorer PI averages approximately 20% better gas mileage than the Crown Victoria. This represents an approximate reduction in annual fuel consumption of 450 gallons per vehicle, which currently equates to an annual savings of approximately \$16,000.

II. Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

Financial Office

PrintSmart

This is a campus-wide initiative to optimize print-output devices (copier, printers and fax machines). The University is moving to a model of paying per print only, having no equipment purchase, lease, maintenance or toner costs. As of June 2014, 46 percent (of 600 units) have approved their unit's design and 35 percent have implemented new devices and print systems for their area. Current projected savings are \$84,000 per month, annualized to over a million dollars a year. Project completion is projected for Spring or Winter 2015.

Service Innovation: UF Collaborative for Operational Excellence

UF's administrative units are working together to identify and implement innovative, easy-to-use improvements for administrative services to more effectively support UF faculty, students and staff. This collaborative will work together to support alignment, coordination and communication across all the various improvement initiatives in the various administrative areas.

Business Process Improvement Office (BPIO)

The University of Florida is committed to continuous process improvement, and has initiated the development of a Business Process Improvement Office. The BPIO will work hand in hand with campus units and directly with the central core offices, to identify issues at both levels. The BPIO will be an active participant in all administrative activities, and a catalyst in effecting change and improvement to any process, with the target goal to make it easier for faculty and staff to focus on the core missions of education, research, and service.

myUF Payment Solutions

Effective March 1, 2014, the University of Florida automated and centralized the accounts payable function to remove paper, eliminate costs and improve efficiencies in the Accounts Payable business process. The University moved from the previously decentralized AP business process to a centralized invoice receipt and processing solution. This solution was implemented to address the costs and overhead associated with the decentralized manual processing of large numbers of invoices. The solution provides for centralized invoice receipt, electronic submission and capture of invoices, smart routing of invoices based on captured data, automated invoice matching, systemic controls consistent with UF's approval policies, integration with UF's myUFL financial system and electronic payment solutions. The Implementation of this new solution significantly reduces costs at the department level and supports the effective and efficient operations of the University in support of its missions of teaching, research, and service.

Office of Human Resources

myTraining. The University of Florida and UF Health Shands are developing a new integrated training management system for faculty and staff. The shared "myTraining" portal will launch in the fall of 2014. Along with managing the training records of employees of both organizations, the "one-stop" portal will enable faculty and staff to view training schedules, register for professional and required classes, and complete online training. Expected outcomes include increased efficiency, ease of use, and enhanced offerings because myTraining will:

- Communicate training requirements more easily and improve compliance
- Easily enroll those inside – and outside – both UF and UF Health Shands, eliminating "work-around" processes to accommodate individuals who are not employees, but who are required to access these resources (e.g., volunteers, students)
- Enable employees at both organizations to access the same training
- Simplify access to training records and reports
- Integrate training records from each organization's former system

On Target Classification Project. The Office of Human Resources has launched a comprehensive review of UF's TEAMS classification titles to ensure they are meaningful and accurate, with clear career paths. This project represents the first comprehensive review and update of the UF staff classification system since the State of Florida restructured staff classifications in the early 1990s. When implemented, the "UF On Target Classification Project" will enhance overall efficiency by:

- Providing TEAMS employees with more meaningful job titles that reflect what they do
- Establishing clearer career paths and potential promotional opportunities through logical job groupings
- Enabling UF to align training and development plans with job classifications to better help employees get the training they need
- Allowing for more meaningful performance evaluations tied to the jobs being performed
- Helping recruit great candidates when jobs are vacant because qualified applicants will more readily understand what our job titles mean

While the "On Target" project has begun, it is not expected that staff employees will transition to the new classification structure until fall 2014 through spring 2015. A pilot project for information technology positions was completed this year.

Information Technology

- Renegotiating software contract with a major vendor that will reduce license costs by \$900,000 over the next five years.
- Internet Peering continues to expand, and that currently results in \$312,000 of cost avoidance per year.
- Providing a central license management service that reduces the need for resources and decreases management overhead resulting from inefficient fragmented software agreements or purchases.
- Implementing a common service management tool for central and distributed IT to track requests, incidents, system changes and

configurations. This will consolidate previous systems and create a single process facing users of technology across campus. Savings from system consolidation will be as much as \$100,000 per year while savings from improved end user efficiency to track IT requests will affect every faculty, student and staff member across campus.

- Implementing One.UF, a single portal for all UF self-service functions allowing faculty, staff and students to go to one place to interact with all the university's most common IT services. This will greatly reduce the time required of end users to learn about every individual application and give them a mobile, efficient interface. This is one of the most requested improvements in faculty and student focus groups.
- Implementing Endpoint Management, a single technology suite intended to replace and consolidate numerous point solutions currently used to manage desktop computers, laptops, servers and mobile devices. This will have impact in many areas including: reducing utility consumption by computer workstations, improving security, reducing support costs by streamlining computer management tasks, simplifying management of computers and devices, and improving the user experience.
- A secure infrastructure called GatorVault is being built that will offer the researchers at UF the ability to store protected health information (PHI) and other restricted data and process it with modern high-performance computation and data analytics tools. This will simplify the Institutional Review Board (IRB) review process, allowing researchers to perform analysis and computations heretofore impossible, and greatly reduce the risk to the university that data will be released or exposed without proper authorization. Since many research projects now operate special servers to handle PHI data, this will bring cost savings to many grants, estimated at multiple \$100,000. In addition the reduced risk will reduce the number of fines resulting from data breaches. These fines run in the multiple million dollars.

Division of Business Affairs

Business Services

- A new Pepsi telemetry program is being tested on the UF campus to improve product availability, machine up-time, and route delivery efficiencies.

- Implementing a two-tiered pricing strategy for snack vending. All machines will offer a \$.10 discount on cash and Gator 1 Card transactions saving customers an estimated \$90,000 in 2014-2015.

Gator Dining Services

- Implemented new processes to allow all students to take advantage of tax law changes effective July 1, 2014 exempting meal plans from sales tax (saving approximately \$90-\$100 off each meal plan). This change will save our students close to \$500,000 for 2014-15.
- Developing a Post-Consumer composting pilot program in the Reitz Union with expected reduction in landfill waste of 90%.
- Expanding the pre-consumer composting program to Health Science Center with expected reduction in landfill waste of 90%.
- Aramark has committed to source all of its seafood from sustainable sources in accordance with the Monterey Bay Aquarium's Seafood Watch Program Guidelines by 2018.

Transportation and Parking Services

- TAPS will complete lighting retrofit projects in Garages 11 and 12 during 2014-15 to install new energy efficient light systems to reduce energy consumption and utility expenses. Estimated savings in both energy consumption and utility expenses are between 30-45%.
- TAPS will introduce the new cling decal to students in August 2014 following the successful launch of the new program to faculty and staff for the 2013-14 decal year. This sustainability initiative eliminates the use of plastic display devices and large mailers. The projected savings in postage and plastic is \$50,000 annually.

Physical Plant Division

- Begin collection of food waste at dining facilities and convert organic material into compost.
 - Collections of food waste began in conjunction with 2013 football events and on campus in February of 2014. We worked with our waste partner WCA to have this material transported to a local compost facility. Beginning February 2014 until the fiscal year end on June 30th we collected 71.2 tons of food waste from the three dining halls. That, added to the 25.06 tons collected during the 2013 Football season, gave

us a total of 96.26 tons or 192,250 pounds. During FY 2014-2015, we will continue to work with Aramark and WCA to expand this program to other dining locations. We have been considering the development of the program with several other areas that include Krishna Lunch, Sorority Houses, UF Health, and UF Housing. We have also started the process of investigating paper towel collection in restroom locations.

- The addition of Construction and Demolition (C&D) Waste to the collection data.
 - For the past several years the collection of large project C&D waste has not been included in the UF waste stream data. We have been working with the Office of Sustainability and Planning, Design and Construction to begin tracking this waste data and including it in our reporting. We have also been exploring the possibility of collecting small project waste and including this data as well.
- Become the expert in waste diversion and recycling.
 - PPD has recently filled an open position in the Waste Reduction and Recycling department. This person will be our technical expert in identifying and leading us to waste reduction goals. We are also going to be partnering with Alachua County Solid Waste and Recycling group in order to form a waste reduction partnership.
- Develop Work Performance Metrics and Performance Indicators to continuously improve technical and managerial processes in order to minimize the life-cycle maintenance and repair costs and improve work order management and execution.
- In FY 2013-2014 the Building Services department contracted with Core Management Services consultants and asked to be benchmarked against peer institutions for comparisons as well as to help develop an absentee replacement strategy. Implementation of their recommendations will help to improve on the service we provide to our customers without negatively impacting our budget.

Planning, Design & Construction

- In 2014, a new portal was introduced on the PD&C website to allow colleges/ units to request renovations, remodeling, alterations, studies, concepts, estimates and other services. This new portal has improved the

turnaround of projects for the customer and centralized project requests via an online portal.

- Completed negotiations on two ESCO “performance contracts” for the Reitz Union and Dental Science Building to replace/upgrade chillers, lighting and air handling systems while paying for the improvements with guaranteed savings.
- The 179D federal Tax Rebate Program was implemented in 2013 and achieved its first shared rebate on the Biomedical Sciences Building of a net savings of \$31,000. There are currently ten additional projects being audited with the consultants and builders with expected rebates in 2014. The federal program is anticipated to be extended until 2016 for energy efficient designs.
- The 10-year campus master plan is well underway for 2015-2025 with anticipated hearing by the Board of Trustees in December 2014. Policies are being updated to streamline the review process & policies for mitigation of assets, such as trees, parking and conservation that are affected during construction, thereby saving design time and construction costs.
- Ongoing improvements in the management of the Quick Response Program, which has been expanded to include the Health Science Center, will allow for reduced costs through the use of small contractors and subcontractors, quicker turnaround time for the departments and quick payment through the departments to the subcontractor.

Office of Sustainability

- The Office of Sustainability is in the process of developing and implementing a Green Office/Lab Certification program, which would: a) Provide offices/labs with initial feedback and information on improving energy efficiency and reducing environmental impact; b) Set forth voluntary guidelines and criteria for offices/labs to implement; c) Highlight best practices for operations and purchasing (i.e., utilizing the PrintSmart initiative); and d) Acknowledge and award Green Certification status to offices and labs that are working toward sustainable practices at the University of Florida.
- The Office of Sustainability is also interested in initiating an Occupant Behavioral Energy Awareness and Reduction program to increase building

efficiency across campus. Additionally, the Office will continue to identify areas of potential cost savings through transition of single-use containers to reusable models, both in dining halls and food establishments as well as offering sustainable, reusable items in 'supply vending' machines, similar to that of the O'Connell Center and Business Services models that have been outlined in the past.

- In an effort to reduce the expense of and demand for campus fleet vehicles, fleet vehicle parking, and fleet maintenance, the Office of Sustainability is currently engaged in the Beta phase of a departmental bike program. Outcomes, observations and feedback from the program may potentially serve as a foundation for a campus-wide bike rental or bike sharing program in the future.
- The Office of Sustainability plans to revisit and evaluate campus sustainability goals and initiatives to identify efficiencies in implementation of programs and pathways to greater campus operational sustainability. Similarly, the office will evaluate its ability to help centralize communication efforts that highlight and increase the visibility of campus-wide sustainability initiatives. The office is also in the process of streamlining and consolidating printed communications and marketing materials in an effort to decrease expenditures and reduce environmental impacts.



University of North Florida Efficiencies

Listed below are some of the significant campus projects UNF has undertaken in the past few years to address the goals of cost-savings, increased efficiency of resources, and reduction in consumable energy.

- We realized a 20% reduction in water and sewer charges from FY 2013 to FY 2014; equating to \$93,000 in savings.
- Completed deployment of a mobile work management system. The deployment including placing approximately 5,000 QR codes around campus for use by staff in responding to or creating work orders. Staff can now open and close work orders in the field thereby eliminating time traveling back and forth to the shop and increasing time available to respond to service requests.
- Completed deployment of GPS based tracking system for fleet vehicles. Coincidentally, we have seen a 10% reduction in our fleet fuel expenditures
- With the recent signing of new contracts for snack and cold beverage vending, all vending machines on campus are brand new, energy efficient units. This resulted in an annual electric saving of over \$8,000.
- Over the previous few years we have outsourced or contracted out numerous services to recognize significant savings. These include:
 - 1) Postal Services were outsourced to a third-party vendor. As a result of this effort, mail pickup and delivery across campus has been increased to twice daily, a service level never before accomplished at UNF. This has created savings of over \$512,000 since inception.
 - 2) The Duplicating Services operation was closed and digital printing was outsourced. Under this program service levels remained at the already high levels being previously provided, however, the pricing to departments was reduced by approximately \$30,000 annually and the annual operating loss of approximately \$105,000 was eliminated. To date savings from this action have exceeded \$675,000.
- We continue to emphasize our commitment to "green" and sustainable facilities. Since 2005 we have built seven "green" buildings.
- Through centralized strategic sourcing of our contracts and purchases we have documented savings totaling \$853,922 for the current fiscal year.

- Within Information Technology we continue to utilize server virtualization which results in significant savings in power, cooling, networking and space requirements.
- We have created our first virtual lab for student and faculty use. This enables students and faculty to access their required systems for lab use anywhere at any time. Long term, this should enable us to be able to much more efficiently respond to student needs without the creation of expensive new physical lab and classroom space. This was made possible by working in cooperation with USF in licensing required software at a reduced price.
- Since 2002 we have outsourced the hosting of our ERP system as well as numerous other ancillary systems to the data center at USF. This resulted in savings both in staffing that didn't have to be created and hired, as well as, space and utilities, and ultimately leveraging their expertise in areas we didn't have or want to invest in.
- Moved or positioned several systems in the "cloud" resulting in reduction in costs for hardware and staff support. Examples include: student email, strategic planning software, contract management, and Help Desk software. A specific example of costs savings include over \$17,000 annually for our parking services system being moved to a hosted environment.
- Since 2003, we have been equity owners of Florida LambdaRail LLC, resulting in significant savings for commodity Internet and other high-end networking services.
- As affiliate members of the Sunshine State Education and Research Computing Alliance (SSERCA), UNF collaborates with other SUS and private universities in the state to obtain access to high performance computing platforms when and as needed.
- Secured as needed access to the Dive Safety officers and programs at UF to support faculty research.
- Outsourced building code enforcement to UF, forgoing costs associated with hiring staff to support this function.
- Departments continue to look for ways to utilize internal shared services. One example include the Herbert University Center and Fine Arts Center using internal university resources for marketing photos instead of external vendors. Annual savings for the single department were approximately \$2,000 per year.
- Business process was changed to provide better and more affordable service. Previously students only had the option to pay for a parking permit via credit card, check or Ozzie Bucks (campus cash). Students with financial aid were

required to wait to purchase a parking decal until they had liquid funds available which meant possibly losing out on the opportunity to purchase a premium parking space. This was causing distress for students and the Parking Services staff. By allowing students to put the cost on their student account, Parking Services is offering better service to the students. While there will be some loss of interest revenue due to later receipt of cash, the expense in merchant fees will reduce by approximately 40% (savings estimated at \$24,000 per year).

- Positions continue to be evaluated as they become vacant to ensure they are being used appropriately and efficiently.



State University System Efficiencies

University: USF System

I. Identify academic & administrative efficiency initiatives that are continuing or have been implemented during the past year.

- Environmental Health and Safety implemented an in-house asbestos testing program that resulted in a projected savings of \$15,000 in FY13-14.
- Through focused recruitment, increased AP vendor payments made via ACH electronic funds transfer by 82% and automated employee ACH enrollment for travel reimbursements. This saves office costs and labor required.
- USF designated Specialty Underwriters as its preferred vendor for equipment maintenance, saving approximately 18%.
- Utilization of “cloud” services to reduce costs of on-premises services. Projects include Microsoft Office 365, Box.net for storage and file sharing and migration to Canvas (USF’s hosted Learning Management System).
- In Sarasota, The leaders of USFSM, New College, FSU Ringling Museum, State College of Florida, Ringling College, and Eckerd College formed the Consortium of Colleges of the Cultural Coast to share resources. Among other collaborations, this led to HR directors using joint training for staff, specifically for Title IX.
- USFSP has created a new full-time position, Sustainability Coordinator, to work in all university areas to reduce greenhouse emissions by cutting back on energy use and reducing landfill flow. USFSP is working to bring its main campus parking facility to net zero energy by retrofitting LED motion-sensor lights, installing rooftop solar panels and installing a 100kW energy battery to best utilize stored energy.
- USFSP has also worked to equip police officers with bicycles on campus, saving fuel and maintenance costs associated with using other vehicles.

II. Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

- Human Resources is implementing a document imaging solution for employee records, which will save \$20,000 - \$25,000 per year in storage (microfilming), improve availability of records, and assist in timely record management.
- Implemented the Orbitz-for-Business Travel Platform that will improve cost savings, optimize travel spend and standardize travel recordkeeping.
- Implemented automated feeds from admissions applications to OASIS, eliminating need for duplicated manual application entry by staff and/or applicants.



State University System 2013-2014 Efficiencies Made, Underway or Planned

University of West Florida: Division of Business Finance & Facilities

Facilities Development & Operations

Installed Light Emitting Diode (LED) to replace existing fluorescent: Replaced 126 light fixtures and 90 High Intensity Discharge light fixtures with energy efficient LED light fixtures. Estimated cost savings, \$50,000.

Installed Light Emitting Diode (LED) exterior lighting to replace existing metal halide: Replaced 22 existing metal halide parking lot fixtures. Estimated cost savings, \$13,000.

Reduced maintenance operating expense: Employed Other Personnel Services staff to perform pressure washing, pine straw harvesting, and pine straw bed cover installation in lieu of contracted services or full time staff. Estimated cost savings, \$4,500.

Revised and updated Standard Operating Procedure (S.O.P.) AES 2.001: To give clear direction to review group members regarding project review comments. The new procedure assists the project managers with an efficient and timely review for all project document submittals. Feb. 2014.

Installed light emitting diode (LED) lamps to replace high intensity discharge (HID) lamps: Projected annual electric utility savings is 127,000 kWh with an annual electric utility cost savings of \$11,000 with a 6.5-year payback.

Installed variable frequency drives (VFD) on chilled water pump motors: Projected annual electric utility savings is 715,800 kWh with an annual electric utility cost savings of \$62,000 with a 3.5-year payback.

Installed variable frequency drives (VFD) on air-handling unit fan motors: Projected annual electric utility savings is 1,360,850 kWh with an annual electric utility cost savings of \$122,000 with a 2.5-year payback.

Installed heating hot water condensing boilers to replace existing water tube boilers: Projected annual natural gas cost savings of \$42,000 with a 15-year payback.

Installed high efficiency heating hot water boiler burner to replace existing heating hot water boiler burner: Projected annual natural gas cost savings of \$21,000 with a 7.0-year payback.

UWF Business Enterprises, Inc. (B.E.I.)

Converted to more efficient Point of Sales (POS) software: Converted POS software from IBS to JONAS. Enhanced reporting capabilities and allows for remote access for accounting team.

Replaced copy machine with no charge unit: Replaced copy machine and accompanying lease payment with a no charge copy machine. Resulted in savings of \$6,300 on an annual basis.

Installed limited access boxes around thermostats: Installed protective boxes around all thermostats in building to eliminate random changing of temperatures. Maintain cool at 74 and heat at 68. Resulted in annual utilities savings of \$13,200.

Renegotiated Brinks Armored Transportation Services agreement: Worked with contractor to consolidate pickup and deliveries and reduce fuel surcharge. Resulted in annual savings of \$2,020.

Renegotiated the Dining and Events Services contract: The new contract includes investments in a restaurant/retail parcel, which will result in a minimum guarantee of \$125k annually for Argonaut Village Restaurant Development with future rent percentage to be negotiated for each tenant.

Financial Services

Decreased number of POs processed by 51 and increased PCard spend by \$1,178,442: Resulted in a \$181,144 rebate for FY13-14 which was a 13% increase over FY12-13 and created more efficiency in processing requests.

Changed the procedure for processing deductions for employees entering the DROP program: Eliminated the requirement to separately pay invoices for employees that enter DROP in the middle of a pay period.

Improved the employee refund process: Developed a process using a web application that programmatically updates employee deduction records, expediting processing of employee insurance refunds.

Centralized repository for business processes: University business processes associated with Banner Student have been documented in Confluence. All

business processes will ultimately be documented and stored in this common medium in a central location.

Transitioned to Banner Student Accounts Receivable: The successful conversion of account receivable balances occurred July 27 and is being fully implemented for the Fall 2014 semester. Implementation has been structured to meet university data reporting needs.

Transitioned to CashNet E-Market: The new system is providing a more efficient platform for the purchase of departmental goods and services.

Business & Auxiliary Services

UWF Postal Services use of automated addressing and processing service: Saved departments \$21,447 over First-Class costs which is \$5,619 additional saving over FY12-13.

Negotiated a more favorable agreement with SMA, UWF's licensing partner: The three-year extension will provide the University with an additional 5% in commissions of the first \$25,000 in annual revenue.

UWF Bookstore text rental program expanded: In FY13-14 the program generated \$251,200 in savings to students of over purchasing new texts compared to \$218,000 in FY12-13, an increase of \$33,200 in savings.

UWF Bookstore digital course material expanded: The availability of digital course material was increased by more than 200 units over last year. In FY13-14 the digital text option provided more than \$24,000 in savings to students over purchasing new printed textbooks, compared to \$15,000 in FY12-13, an increase of \$9,000 in savings.

Received Board approval for a lower cost parking option: A new “remote lot” permit is priced at one-half of the lowest automobile permit price and will be valid for specific locations on the east side of campus. Shuttles will deliver students and staff from the remote lot to the core of campus. A benefit to the new option is that it will increase efficiency by opening parking spaces in the high traffic locations.

Purchased a GPS trolley tracking application: The app will allow riders to access trolley location and wait times in real time on smart-phones and other mobile devices. The app will allow for better planning and safety. Increased use of the trolley will create more efficient use of available parking spaces.

Increased use of public transportation with bus pass policy: Improved communication about complimentary bus passes to currently enrolled students while classes are in session and provided a second location for bus pass pick up. 5,834 bus passes were distributed to students in FY13-14 compared to 2,152 in FY12-13, an increase of 3,682 or 171%. Encouraging students to use public transportation helps to reduce the number of single occupancy vehicles on campus and helps to improve parking efficiency.

University of West Florida: Division of Academic Affairs

Office of the Provost

Continued document-imaging implementation: Creating additional electronic processes and cross-training office staff in the procedures to increase office effectiveness.

Created a financial break-even analysis tool: Allowing the colleges to identify courses which need to be considered for removal or consolidation due to low enrollment. This replaces several reports that previously had to be specifically requested and took hours to generate and return to the requestor.

Created a system allowing college financial managers to automatically generate summer assignment letters: Using real time course data, this has allowed colleges to make course offerings and faculty assignment changes and immediately generate a new letter. In the past, there was a wait of days to weeks before new letters would be created, and they had to be individually written in MS Word.

Standardized and streamlined the request and approval process for additional/extra compensation: Implementing an online form that can gather all necessary data to complete the form and calculate the hourly rates, FTE, annual caps, and many other fields, which were previously manually entered. This has saved considerable time in data entry, information look-up, error checking, and redundant processing. Over the next year, the process will be further improved by implementing an all-electric workflow for the forms.

Continued to utilize volunteer workers for document scanning: Reducing file storage space and increasing office productivity.

Developed a single tracking mechanism: Enhancing faculty and staff position searches.

Information Technology Services

Converted telephone circuits from AT&T SmartRing to Department of Management Services PRIs: Savings average \$4K/month or \$48K annually.

Reviewed Oracle invoices: Management review of Oracle software contracts and invoices uncovered \$55K in maintenance over-billings from Oracle, for which the university was credited.

Consolidated university software licenses: Consolidation of college and department-level software licenses into university-wide licenses has resulted in approximately \$10K in aggregate cost avoidance for the university.

Coordinated computer lab upgrades: UWF performed university-wide upgrades of student computer labs on a coordinated schedule, allowing for discounts arising from bulk purchases of computers. Aggregate savings is approximately \$15K annually.

Continued document imaging in Undergraduate Admissions, Financial Aid, and Registrar departments: Moving from paper to electronic document processing improves services to students, improves the speed of business processes, and reduces cost of file storage space and equipment.

Consolidated to a single document imaging system: Legacy documents in UWF's Nolib system are being converted to Banner Document Management. Using a single document imaging system for the university will save approximately \$40K annually in software licensing costs.

John C. Pace Library

Analyzed interlibrary loan usage and cost data to identify savings: Reviewed the cost-per-article use for each of our subscription e-journal titles. Based upon the calculated cost of \$11.17 to borrow an article through our ILL service, the UWF Libraries canceled 23 journal titles savings \$10,726 in FY2014.

Implemented a Personal Librarian program: The program provides for email communication with new freshmen and online program students about the availability of library resources, services and assistance in effort to assist with retention efforts.

Implemented LibAnswers, an online Knowledge Base system: The system provides additional information at all times about library resources and services to virtual and remote students.

Implemented LibAnalytics: This increased efficiency and productivity when maintaining library statistical data.

Implemented tutorials for information literacy and bibliographic instruction: The audio/visual instruction sessions were created and made available, on-demand, for use as needed by students and faculty on the libraries' website.

Redesigned Information Fluency online tutorials: The tutorials directly align with the Association of College and Research Libraries' (ACRL) Information Literacy Standards for Higher Education, and increase the number of opportunities for UWF Libraries to undertake student learning outcomes assessments.

Installed software on the libraries' 11 SmartBoards: The software enables student collaboration when using graphing calculators.

University of West Florida: Division of Advancement

WUWF Public Media

Outsourced processing of donor contributions: WUWF Public Media worked with NPR Digital Services to develop a new online pledge form at no cost during FY2014 and secured a PCI compliant credit card processing system with a projected annual savings of \$3,600 in FY2015.

Upgraded broadcast transmitter: WUWF radio replaced a 25-year-old tube transmitter with a more efficient solid state unit with 100% built-in redundancy and "hot swap" capability to replace parts without having to shut down the system, minimizing maintenance costs and time off the air.

Expanded sustaining donor program: Steady growth in acquiring new and converting existing donors to sustaining members who contribute on a monthly basis via EFT or credit cards is resulting in reduced costs in processing, use of paper and postage.

UWF Historic Trust

Replaced lighting with energy efficient lamps: Renovation of the T. T. Wentworth, Jr. Florida State Museum replaced 118 incandescent 90-watt bulbs with 122 LED 14-watt bulbs, saving 8,917.5 watts and receiving a \$3,000 rebate from Gulf Power for energy efficiency.

Replaced lighting with energy efficient lamps: Renovation of the Norman Simons Building to house the new Voices of Pensacola, Multicultural Resource Center replaced the incandescent lighting system with new LED efficient lighting. A mixture of 25 90-watt incandescent bulbs and 40 40-watt fluorescent

bulbs were replaced with 80 LED 14-watts lights. This resulted in a reduction of 2,355 watts. The upgraded lighting system will also use specialized switches and sensors to control the lighting system to further reduce energy costs.

Replaced boiler with more energy efficient unit: Replacement of the T. T. Wentworth, Jr. Florida State Museum boiler required the removal of a 10-year-old gas boiler that had between 75 to 80 percent efficiency, with a new Fusion Boiler that has an estimated 99 percent efficiency. The new boiler will dramatically reduce gas and electricity consumption and has a longer expected life-span than the previous boiler.

University of West Florida: Division of Student Affairs

Office of Case Management

Created online forms for all processes relating to the Argo Pantry: Application, evaluation, tracking, etc. for the Argo Pantry emergency assistance program is handled electronically which reduces the use of paper documents thus increasing office efficiency and student privacy.

Student Transition Programs

Student Transition Programs worked with ITS to transition the orientation registration process to an outside vendor, Visual Zen: Visual Zen went live on February 6, 2014. It streamlined process such as student and guest registration, payment processing, email communication and confirmations, data tracking, reports, pre-orientation videos and online transfer orientation. Other offices that have shared in working with this system are Cashier's Office, Admissions, Nautilus ID Card Office and First Year Advising Center.

University of West Florida: Division of the President

Office of Economic Development and Engagement (OEDE)

Partnered with UWF Library to make "DemographicsNow" database available to the community: Providing this resource through the UWF Library website leveraged funding to efficiently provide demographic information to a wider audience.

Negotiated a reduced cost for leased space for the OEDE downtown office.

Improved office processes by utilizing electronic delivery methods: Examples include submitting electronic copies of reports to DEO rather than paper and

submitting Industry Recruitment Retention Expansion Fund (IRREF) grant program communications to awardees via email rather than mailing.

Human Resources

Expanded access to training: All mandatory UWF training sessions were made available online via E-Learning.

Created an online option for employee exit interviews: The availability of an electronic process has increased exiting employee's response rate which helps the University identify and address problems.

Hiring guides were updated, which increased end-user efficiency.

Workers' Compensation continues to be managed online via a shared network folder. (Implemented during 12/13)

Cross-divisional sharing of specific, relevant employee records: Employees' Conflict of Interest/Outside Activity self-reported information is shared with Procurement employees, simplifying their process of checking for potential conflicts of interest in the procurement function.

Improved communication regarding employee benefits: Initiated a monthly program spotlighting benefits and services available to the campus community in an effort to make employees more aware of their benefits at UWF.

Upgraded and restructured the Human Resources website: The Content Management System (CMS) structured website includes portals for applicants, employees, and supervisors containing specific information for those constituents thus making it more user friendly and easier to update.

Office of the President

Instituted paperless office processes: This change saved 55% of supply cost.

Instituted use of I-pads for UWF Board of Trustee meetings: This significantly reduced staff time spent on setup and breakdown for BOT meetings.

Internal Audit & Management Consulting

Amount of hours spent in auditing increased by 3 percent over last year due to staff efficiencies.

General Counsel

Significantly improved processing time of contracts: Created efficiencies through streamlining of the process.

Streamlined the policy update/review process: The office of the General Counsel processed 47 updates during FY13-14 as compared to 5 in FY12-13, 14 in FY11-12 and 7 in FY10-11.

Haas Center

Created standard pricing model: The new model ensures consistency and ease of pricing comparison for contracts.

Identify new efficiency initiatives that are underway or are being contemplated, along with potential cost savings.

Implementing an electronic work order management process: Utilizing TMA work order management system will improve significantly the opening, distribution, execution, and completion of work orders by eliminating manual work order processing through utilization of hand held electronic devices. The business plan for this process was completed February 2014 and will be implemented next year.

Transitioning to CashNet Cashiering: Will automate departmental cashiering, facilitate the offering of additional services to students, and relieve the university of the labor and cost associated with payment by credit card.

Continuing to research contract management software: This would allow Procurement to be the central depository of all contracts. Features would assist in complying with House Bill 1309 that became effective July 1, 2013.

Planning pilot program for contactless door access: Implementation will involve three sites in which door entry is obtained via UWF ID card. The contactless technology is projected to provide added convenience, faster entry, better security, and improved durability of Nautilus Cards and readers.

Planning development and implementation of a campus way-finding application: The app is expected to be a user-friendly way for students and visitors of the University of West Florida to find directions from their mobile devices. The app will provide an improvement/enhancement to existing maps and signage.

Implementing ConnectOnce/Booknow+: The UWF Bookstore in conjunction with UWF IT department will implement an enhanced version of registration integration--system by which students obtain needed course materials based on individual class schedules. The system improves functionality for students and faculty.

Implementing T2 parking permit and ticketing system: The new permit and enforcement solution allows for management of permit issuance and real-time access to citation information. The system will provide more efficient use of staff time, better record keeping, and greater accuracy in handling permits and citations.

Continuing to implement Ellucian's Banner Travel & Expense Management module: This software will be used to convert paper-based processes for travel and expense authorizations to electronic transactions. This will improve process speed and efficiency and reduce paperwork.

Planning implementation of InCommon and Shibboleth federated identity management to allow sharing of services outside the institution. These federated identity technologies will allow UWF to collaborate with other universities in shared services. For example, Shibboleth will allow UWF students and faculty to use online library resources available via the Haithitrust collaboration.

Planning migration to a more cost-effective business continuity host site. UWF is exploring alternatives to our current "warm site" disaster recovery hosting services in order to reduce costs of these business continuity services. Savings of \$20K annually are sought.

Planning creation of Apple certified service center. UWF is exploring the creation of an in-house Apple certified service center to provide warranty and after-warranty repairs on Apple equipment, with the anticipation of savings to the university and a possible revenue stream from providing services to individuals.

Planning PPEMS software upgrad: The upgrade will increase recruiting, job descriptions and performance evaluations management efficiency.

Sharing video/web-conferencing services via Florida LambdaRail's BlueJeans service: UWF is piloting use of the BlueJeans system for video-conferencing and web-conferencing. Bluejeans is a FLR Net+ service available to Florida LambdaRail members and affiliates. Using the shared BlueJeans FLR+ service saves UWF approximately \$12K annually in software license costs.



State University System Reductions

In preparation for the 2015-2016 LBR submission to the Governor's office, all state agencies were asked to identify the programs and/or services that would be eliminated or reduced if a 5% reduction is made by the Legislature for FY 2015-2016.

For the State University System, the total amount of reductions is an estimated \$120.4 million. Each institution was allocated a proportionate amount of the total reduction based on their recurring general revenue and lottery appropriations for FY 2014-2015.

The following university summaries highlight various reduction proposals; however, the following provides some examples.

- Elimination of training programs and professional development opportunities for faculty and staff;
- Inability to recruit academic advisors to counsel students toward degree completion;
- Inability to recruit and retain qualified faculty that would have a positive impact on student learning outcomes;
- Reduction in on-line distance learning activities and services;
- Reduction in student planned enrollment; resulting in loss of tuition revenues for the upcoming year and beyond;
- Salary reductions and/or layoffs of key personnel;
- Reduction of current and vacant positions; consolidation and/or elimination of colleges, academic and administrative units, degree programs, and class offerings;
- Increase in faculty workload resulting in a decrease in time available for non-instructional activities such as research, curriculum development, design, and evaluation;
- Reductions and delays in upgrading information technology infrastructure;
- Reduced funding for graduate assistantship positions and other applied learning opportunities for students;
- Reduction in financial aid opportunities for merit/need-based students.

2015-2016 LBR



**Florida A&M University
5 Percent Reduction Plan
Fiscal Year 2015-2016**

Reduction Amount GR:	\$4,877,610
Reduction Amount Lottery:	\$741,711
Reduction Total:	\$5,619,321

Although this is only a planning exercise, Florida A&M University (FAMU) hopes that it will not be necessary to further reduce the State University System's (SUS) budget. Six previous years of reductions have severely hampered FAMU's ability to provide the services that are necessary for any well-run university. FAMU has restructured its academic organization, academic programs and administrative operations in response to the budget cuts in prior years. The University is currently seeking to recover from an enrollment decline attributable to policy changes at the federal level. The enrollment decline has reduced the University's tuition and fees collections by over 20%. This coupled with a proposed 5% percent reduction would severely affect all areas within the University and result in the University having to:

- Disrupt approved Board of Governors Work Plans i.e. putting at risk the attainment of planned improvements in the retention and graduation rates as student to faculty ratios would be increased;
- Eliminate some critical positions and functions which may adversely affect life, health, and safety at the institution;
- Increase the use of temporary employees once permanent jobs are eliminated;
- Merge and consolidate academic and administrative units and programs;
- Increase tuition and fees for students;

- Decrease resources necessary to maintain the required SACs and accreditation standards;
- Increase the risk of not having the necessary internal controls in place to avoid external audit findings;
- Reduce the resources available for technology infrastructure and thus hamper efficiency;
- Eliminate training programs and professional development activity for faculty and staff as resources for training would have to be reduced;
- Lose its competitive edge in hiring and retaining highly qualified faculty and administrators;
- Reduce recruiting budget with a resulting slowdown of enrollment recovery; and
- Reduce productivity and quality of service provided to stakeholders because of resulting understaffing in the operating units.



**Florida Atlantic University
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$6,470,755
Reduction Amount Lottery:	\$1,039,277
Reduction Total:	\$7,510,032

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the board percentage reductions.)

The 5 percent reduction plan includes the College of Medicine and student financial assistance.

Potential Impact across the University

A reduction the size of \$7.5 million would result in the following:

Priority 1: Potential elimination of nearly 50 non-academic positions

Impact: Reduction of services levels with fewer employees to service students and faculty

Cost Impact: \$2.5M

Priority 2: Instructors, in lieu of tenured and tenure-track professors, will teach courses throughout the academic year including the summer session.

Impact: Increase in workload and reduced student contact hours outside of teaching.

Cost Impact: \$500K

Priority 4: We will continue to reduce or eliminate full-time administrative employees to part-time status, impacting service delivery to students and faculty.

Impact: Reduction of services levels with few employees to service students and faculty

Cost Impact: \$500K

Priority 5: Hiring freezes for Student advisors and support personnel

Impact: This will stretched current staffing levels thin to accommodate the current level of enrollment which will impact graduation rates and success of student retention and academic progress.

Cost Impact: \$1M

Priority 6: Institute a purchasing, administrative hiring and travel freeze.

Impact: Reduction of services levels and elimination of services with fewer employees to service students and faculty

Cost Impact: \$1M

Priority 7: Initiatives to improve operational efficiencies will be postponed

Impact: Reduction of services levels and elimination of services with fewer employees to service students and faculty

Cost Impact: \$1M

Priority 8: Outsourcing several basic functions

Impact: Outsourcing will realize operational efficiencies but at a service level reduction.

Cost Impact: \$1M

Methodology for Calculations

Approximately 80% of FAU's educational and general budget is linked directly to teaching, community service, research and student support services.

Since 2010-11, the university has experienced base reductions in general revenue and lottery funding from the State of Florida of nearly \$12M. In FY2014-15 as compared to funding 5 years ago, FAU experienced a decline of 8.2% while the system as a whole increased by 8.0% (including FAU's reduction). An additional \$7,510,032 in base reductions will continue to erode the quality of education for our students, will affect our ability to retain faculty and staff, to fund basic student services, keep and maintain facilities, respond to federal and state regulatory issues, and meet the goals and objectives of our strategic plan. The effect of reductions in funding will result in the inability to graduate students in six years and will affect the academic progress rate which in turn has a negative impact on the university's performance metric.

Statutory Changes - N/A

Other State Entities Impacted - N/A



**Florida Gulf Coast University
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$2,817,867
Reduction Amount Lottery:	\$ 359,656
Reduction Total:	\$3,177,523

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

For FY 14-15, Florida Gulf Coast University (FGCU) was one of a number of institutions awarded performance funding based upon the recently approved model. If this 5% reduction was implemented, a significant amount of this funding used for improvements would have to be rolled back in FY 14-15, thus negating a portion of the benefits the performance funding is to provide.

Florida Gulf Coast University has labored with a dearth of advisors for a number of years. If a 5% reduction were imposed, the University would be compelled to cancel hiring plans in this area, saving \$540,000 but at the cost of potentially not achieving targeted improvements in the graduation rate or reduction of excess credit hours.

Services in the area of tutoring, lab, writing centers, and career services would feel a loss in funding. Furthermore, the First Year Experience program, including the on-site locations in the residence halls, would suffer as positions and support that was intended to improve the academic progress rate and FTIC graduation rate would not be available. The reduction would total \$550,000

Florida Gulf Coast University is planning to improve its marketing functions and strategies, targeting talented students to bring to the campus and the state. The elimination of this initiative would return \$500,000 in funding.

The Library at Florida Gulf Coast University is considered to be the academic center of the institution. Recently, funding was allocated in order to expand not only the available lab space, but provide an increase in the electronic and printed materials that are available to faculty and students in their academic pursuits. The goal is to make available tools that are needed, particularly for the students, to progress as intended. The funding of \$544,000 would be lost in the event of the reduction.

The balance of the reduction, \$1,043,523 would be sourced from recent improvements and upgrades to support functions, primarily through the elimination of recently allocated positions. In addition to support positions created to support faculty within the academic core, positions within student affairs, campus police, admissions and technological departments amongst others would be eliminated. The purpose of this investment was to provide a more stable and robust learning environment.



**Florida International University
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$10,505,148
Reduction Amount Lottery:	\$1,533,253
Reduction Total:	*\$12,038,401

** Includes FIU Medical School and is based on recurring FY 2014-15 general revenue (excluding Risk Management) and lottery appropriations*

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the board percentage reductions.)

Potential Impact

A 5 percent budget cut will impact the university as follows

- Given our continued current minimal level of reserves, we would be forced to eliminate approximately 106 administrative, faculty, and staff positions to offset this reduction.
- Services and programs offered to students would be directly impacted in the amount of classes offered, advisors available and support services.
- We will be unable to enroll approximately 1,600 students annually.
- The university will be required to develop plans to eliminate educational programs and support areas.

Methodology for reduction

- In fiscal year 2007-08 academic and administrative units at FIU developed a long-term budget reduction plan.
 - All academic and operational areas of the university have been reviewed to make targeted cuts that would inflict the least long-term damage to the university.

- As a result of this analysis, the university closed 37 degree programs and 18 centers and institutes
- The university restructured the curriculum in educational units, consolidated departments, and lowered operational costs to just the minimum needed to maintain an acceptable level of services.
- The university renegotiated contracts for services and redefined business models to lower costs of services.
- The university implemented initiatives to save energy and other costs by reducing the size of our fleet of vehicles, moving from liquid propane to natural gas, retrofitting lighting, and other efficiency measures.

An additional state appropriation reduction in Fiscal Year 2015-16 will mean that any net funding increases through the performance funding model will not be available. Planned initiatives to improve results of our performance metrics, providing a return on investment to the state, and realizing the university's strategic goals will need to be scaled back or placed on hold. FIU will need to find a way to operate with \$12 million less and still fund basic student services, maintenance increases, additional compliance requirements, and contractual increases that are not being funded by the state.

Our efforts continue to be focused on providing students with a quality education, but our ability to deliver will be severely hampered with additional reductions. Given the significant decrease in our reserves, we can no longer shield students, faculty and staff from the negative impact of a 5% budget reduction without requesting the use of the statutory reserve balances.

In the event that the 5% reduction becomes a reality in Fiscal Year 2015-16, we will reassess our long-term plan and, in collaboration with academic administration, faculty, staff, and students, will develop recommendations to our Board of Trustees for the elimination or reduction of a number of academic programs, centers, institutes, services, and support operations.



**Florida Polytechnic University
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$ 1,510,257
Reduction Amount Lottery:	\$ 22,828
Reduction Total:	\$ 1,533,085

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

Potential Impact

Florida Polytechnic University is designed to be a technology-rich and interdisciplinary learning environment to students, as well as a powerful resource and research partner for high-tech industry. The University will open its doors to students in the fall of 2014. A reduction of any magnitude would have a negative impact on the University's ability to fulfill its mission.

Being a brand new University, strategic decisions would need to be made on which areas of the budget would be reduced should the 5% budget reduction exercise becomes reality. For planning purposes, the University would consider the following:

Priority Number One - Reduce University Support

- **University Support/Shared Services - (\$500,000)**

The University would delay hiring additional staff which will result in fewer staff to respond to increasing needs and requirements of the student body, academic programs and regulatory reporting. In addition, the University would have to continue its shared services agreement longer than initially planned which will prevent us from implementing a plan to automate and significantly reduce long-term administrative costs.

- **Information Technologies - (\$300,000)**
The University would limit the implementation of cost-saving technologies that reduce administrative touch labor. We would not be able to adopt new IT technology and equipment which will have a negative impact on our high-tech students and applied research program.
- **Marketing/Communications - (\$333,085)**
Being a new university we rely more heavily on marketing to spread the word and recruit the top STEM-oriented students in Florida. A reduction would impact our ability to recruit high quality students.

Priority Number Two – Reduce support for plant, operations and maintenance, (including facilities)

- **Plant, Operations and Maintenance - (\$400,000)**
Although the campus has new buildings, the University would increase the initial timelines for preventative maintenance; eliminate positions and consider outsourcing; and reduce custodial services.

Justification for Priority Number: The justification for assigning the relative priority for reduction was based on the least impact to student learning and engagement and the University Strategic Plan.

Calculation Methodology: Because the University does not have historical data for its full cost, the calculation methodology used for the reduction issues was based on the budget.

Statutory Change: There are no requests for statutory changes.



**Florida State University
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$14,062,520
Reduction Amount Lottery:	\$ 1,975,507
Reduction Total:	\$16,038,027

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

The target budget reduction is substantial, coming after just two years of increased state revenues. If implemented, it will cut into the university's core mission to preserve, expand, and disseminate knowledge through instruction, research and public service. That mission is funded through 17 program components whose funds provide services ranging from enrollment to student services to library staffing. Significantly, state funds have traditionally been used to fund student access through enrollment program components. Increased numbers of students funded through enrollment program components, in turn, are provided services through funds allocated to the other program components. Due to previous budget reductions, a 5 percent reduction cannot be absorbed through efficiencies or trimming around the edges. The university has by necessity become more efficient. In fact, for the second year in a row, US News & World Report has ranked FSU as the most efficient university in the country in delivering a quality education. All efficiency savings are being used to retain our employees or to repair and maintain our facilities. Many campus services have been privatized. For example, the food service, vending, bookstore, elevator maintenance, chiller maintenance, collection services, bus service, e-mail, painting and printing have

been privatized. An additional 5 percent reduction in state funds necessarily will require a reduction in planned enrollment program components if critical components of the university are to be sustained. Most of the remaining program components will be reduced as a result to the loss of funds to the instruction program component and the decline in students to be served. We have identified the planned instruction program component for reduction because taking the 5% reduction only in the remaining program components would disrupt university operations, often in unintended ways. Of course, the university will continue to review its operations to identify additional or alternative efficiencies to allow for continued access. Many of these efficiencies are included in a separate submission of efficiencies provided to the Board of Governors. After a reduction of more than a quarter of state revenues, however, these efficiencies are less evident than they once were and are much more difficult to realize.

In order to accommodate a 5% reduction, a decline in 764 FTE students can be anticipated stemming from the decline in services provided with the funds available through the planned instruction program component. FSU continues to be the university of choice for many students; for Fall, 2014 admission, FSU received nearly 40,000 applications. Not only would prospective students and their parents be negatively affected by the reduced slots available for students, but there would also be a reduction in the number of full time faculty and staff (139 FTE). The enrollment reduction represents a decrease of \$5,124,642 in general revenue for the instructional program. The loss of this number of students, if realized, will also result in a reduction of \$3,316,574 million in student fees in addition to general revenue. The student fee shortfall as well as a portion of the instructional reduction may be offset, in part, through an overall increase to tuition and fees. It should be noted that some instructional losses may have to be offset for two years using university balances in order to comply with accreditation standards for the “teach out” of students in the midst of pursuing degrees.

Based on the reduction target assigned by the Governor's Office, a reduction of \$10,913,385 remains to be prioritized among the remaining program components. Most will come from program components providing other academic services and a range of enrollment related activities. FSU has developed reductions for 13 program components. The reductions are as follows:

Program Component: Academic Administration

Administrative, management and support services crucial to delivery of instruction in academic majors and other academic programs will be reduced by \$1,300,466, resulting in slower service and less assistance to students in completing their degree requirements, which could interfere with timely degree completion.

Program Component: Student Services

Services and programs which enhance the educational environment of the campus will be reduced \$1,619,548. These reductions will impact the availability of counseling and health services, student activities, Center for Academic Retention and Enhancement (CARE) and orientation programs. There will also be a reduction to services that provide financial aid evaluation and programs to assure prompt and orderly admission of applicants as well as a reduction in service to the area that provides administration services and initiates, maintains and preserves the official academic record of each student.

Program Component: University Support

The non-instructional support area will be reduced \$1,678,747. These units include all components of university administration and will result in slower processing of invoices, delay in getting bids to potential vendors, delays in processing vacancies for employee applicants, and slower response times for assistance.

Program Component: Plant Maintenance

The plant operations and maintenance will be reduced \$2,674,084. Preventative maintenance efforts will be performed on a less than

optimal schedule and slower response time will result for routine repairs and maintenance.

Program Component: Public Service

The activities associated with the professional and/or discipline related services, other than instruction, that are beneficial to groups or individuals in the community will be reduced \$164,396.

Program Component: Academic Advising

Formal counseling to students on academic course or program selection, scheduling, and career counseling will be reduced \$276,536. The University has invested heavily in academic advising, academic mapping, and tutoring to help increase graduation and retention rates. These efforts appear to be paying off.

Program Component: Libraries/Audio Visual

Funding associated with the acquisition, organization, maintenance and control of library materials will be reduced \$279,753. The library materials budget will be reduced \$339,056.

Program Component: Radio and TV

Funding associated with activities related to the operation and maintenance of broadcasting services primarily dedicated to educational, cultural and public service programs will be reduced \$79,282.

Program Component: Museums and Galleries

The Ringling Museum activities related to the collection, preservation, and exhibition of historical materials, art objects, scientific displays and other objects under study at the Museum will be reduced \$111,906.

Program Component: Research (includes Institutes and Centers)

The research component will be reduced \$2,389,611. These funds support all ongoing research activities and will result in fewer

resources being available to explore new research ideas. These funds support faculty while writing grant proposals.

The FSU Board of Trustees adopted the following Reduction Priorities:

Do not adversely affect enrollment if possible

Maintain sufficient courses to ensure timely graduation and maintenance of MAP progress

Exempt key infrastructure and operational services

Fund shift E&G costs to auxiliaries where possible

Eliminate expenses where possible, but retain expense funds for on-going operations

Promote enrollment by out-of-state students

Provide all units undergoing reduction an opportunity to justify current expenditures

Consolidate services where service quality does not suffer

Assign lower funding priority to entities not providing direct services to students

Preserve where possible programs disproportionately contributing to the research mission and operations of the university

Maintain existing PI accounts where possible



Florida State University (College of Medicine)
5% Reduction
2015-2016 Legislative Budget Request

Reduction Amount GR:	(\$ 1,716,049)
Reduction Amount Lottery:	(\$ 30,256)
Reduction Total:	(\$ 1,746,305)

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

2015-16 Five Percent (5%) Budget Reductions

Florida State University's College of Medicine was charged by the Legislature to educate and develop exemplary physicians who are especially responsive to the needs of the elder, rural, minority and underserved populations. Resources were provided in the 2014 GAA to accommodate 480 students and actual enrollment is aligned with this target.

FSU College of Medicine developed a priority reduction by program area as follows:

Program Component: **Academic Administration** (Priority #1)

Administrative, management and support services will be reduced by \$666,854 in general revenue and by \$11,758 in educational enhancement funds. This reduction will result in slower and less frequent assistance related to the administrative support required in the delivery of academic programs.

Program Component: **Academic Advising** (Priority #2)

Formal counseling to students on academic course or program selection will be reduced by \$93,941 in general revenue and \$1,656 in educational enhancement.

Program Component: **Research** (Priority #3)

The research component will be reduced by \$708,932 in general revenue and \$12,499 in educational enhancement. These funds support all ongoing research activities and will result in fewer resources being available to explore new research ideas and less student exposure to research activities.

Program Component: **Library Resources and Staffing** (Priority #4)

Library resources will be reduced by \$11,323 in general revenue and by \$200 in educational enhancement, while library staffing will be reduced by \$38,858 in general revenue and \$685 in educational enhancement.

Program Component: **Public Service** (Priority #5)

The activities associated with the professional and/or discipline related services (other than instruction) that are beneficial to groups or individuals in the community will be reduced by \$192,167 in general revenue and \$3,388 in educational enhancement.

Program Component: **University Support** (Priority #6)

The non-instructional support area will be reduced by \$3,974 in general revenue and \$70 in education enhancement. These reductions will result in slower processing of financial transactions and slower response time for assistance.

FSU College of Medicine Reduction Priorities:

Do not adversely affect enrollment.

Maintain sufficient faculty to ensure timely completion of the medical degree.

Exempt key infrastructure and operational services.

Fund shift E&G costs to alternate funding sources where possible.

Prioritize expenses in such a way that expense funds are retained for on-going operations.

Provide all units undergoing reduction an opportunity to justify current expenditures.

Consolidate services where service quality does not suffer.

Assign lower funding priority to entities not providing direct services to students.

Preserve where possible programs disproportionately contributing to the mission and operation of the College.



New College of Florida 5% Reduction 2015-2016 Legislative Budget Request

Reduction Amount GR:	\$824,676
Reduction Amount Lottery:	\$ 55,212
Reduction Total:	\$879,888

(Pursuant to the State of Florida Legislative Budget Instructions, reductions must be program/issue specific and cannot simply be across-the board percentage reductions.)

Actions to absorb the previous recurring budget reductions in past years leave very limited options for the College to consider should an additional 5% (\$879,888) reduction need to be implemented effective FY 2015-16. College-wide budget reduction planning efforts, informed by work of the College's ad hoc faculty budget committee and executive review, have sought to minimize the damage to the core academic program. Efforts will continue to focus on reducing non salary operating expenses. However, given that 76% of E&G costs are related to salary and benefits and in consideration of already insufficient staffing for critical support functions and minimum faculty staffing required for accreditation regarding the range of academic offerings, future reductions approaching 5% will likely require some form of salary reductions and/or layoffs impacting multiple pay plans.

Action Plan

After making all possible reductions in non salary operating expenses, keeping non critical positions vacated through normal attrition unfilled, increasing revenues, where possible, and deploying cash reserves, the College would implement a graduated furlough plan, with higher paid positions being assigned more furlough days and lower paid positions fewer or none. The actual amount of savings needed to be generated will depend on how successful the College is in reducing non salary operating expenses. Furloughs are preferred to permanent salary reductions, at least for the short term, because this would allow time for the College to assess its economic outlook in relation to the State's, both for the immediate future as well as long term, while retaining its bare bones workforce. The down side is that while the basic workforce would remain intact to deliver services, the College's most accomplished faculty and staff may begin to look for other employment opportunities.

Such a reduction would cause significant harm to the core tenets of the College's highly successful and nationally recognized/ranked academic program. Students would have fewer opportunities for tutorials and collaborative research with faculty. Classes would be larger. Some areas of concentration would have to limit enrollment. Support services, which are already underfunded and understaffed, would have to reduce hours of operation.

Hopefully, the furloughs would buy time for Florida's economy to rebound sufficiently such that the furloughs could be reduced or eliminated. If the recovery takes longer and/or legislative decisions are to implement the reduction for whatever reason(s), the furloughs would have to be converted to permanent salary reductions and/or layoffs. It is recognized that these proposed salary actions will have to be negotiated with the College's three bargaining units, but each understands the magnitude of the State's and College's budget challenges and has expressed support for use of furloughs in lieu of layoffs or permanent salary reductions, at least for the short term, in order to allow sufficient time for any permanent cuts (once they are confirmed) to be thoroughly vetted.



University of Central Florida 5% Reduction 2015-2016 Legislative Budget Request

Reduction Amount GR:	\$ (\$11,591,516)
Reduction Amount Lottery:	\$ (\$1,800,587)
Reduction Total:	\$ (\$13,392,103)

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

As America's partnership university, UCF continues to focus its efforts to enhance student success and lead Central Florida to be a better place to study, work, and live. Thanks to the support of the Performance-based Funding Model, new funds from state Legislature in 2014-15 are being used to enhance and/or create a variety of initiatives, programs, and partnerships in support of the university's overall strategy and drive significant improvements in academic quality, operational efficiency, and return on investment.

A five percent reduction in 2015-16 would equal a retraction of approximately sixty percent of the awarded performance-based funding, and would require curtailment and/or deferral of a significant portion of the continuing and/or recently initiated investment strategies articulated in the current year's University Work Plan. Specifically, the key initiatives and investments that would be directly impacted are as follows:

Faculty Hiring

New performance-based funding from state Legislature is allowing UCF to hire upwards of 100 additional full-time faculty members over the next three years, particularly in the areas of specific focus (e.g. STEM, areas of strategic programmatic emphasis, and emerging fields).

Hiring full-time faculty members enhances the undergraduate and graduate academic experience by ensuring the availability of course offerings to meet student demand; decreasing class size; increasing student engagement; supporting undergraduate and graduate research; and stabilizing UCF's student-to-faculty ratio.

The majority of these 100 new hires will be tenure-track faculty. An emphasis on hiring tenure-track faculty members addresses the overall mix of faculty and the recent reliance on non-tenure-track faculty members, while boosting UCF's growing research promise and potential economic impact. Additionally, UCF is encouraging cross-disciplinary hires to support interdisciplinary teaching and research, in such fields as bioinformatics and data analysis.

Due to the timing of the allocation of funds in 2014-15 and the faculty recruitment cycle at large, the majority of hires will take place during the next fiscal year. Specifically, the anticipated, recurring cost of the plan is over \$17 million, with approximately \$2 million already committed for incoming 2014-15 hires, \$10.5 million for planned 2015-16 hires, and \$4.5 million for planned 2016-17 hires. Additionally, the non-recurring ending balance as of June 30, 2015, is essential to the success of this plan, as it will be used to support the faculty start-up packages that are a necessary tool to recruit exceptional faculty and give them a solid start. Therefore, even a non-recurring reduction of this magnitude would severely affect the hiring plan, as it would impede the university's ability to offer the required start-up packages – particularly necessary in the programs of strategic emphasis identified by the Board of Governors.

Other Initiatives to Increase Retention and Graduation Rates, Research, and Graduate Activity

The additional investments in these areas made possible by the new performance-based funding total just over \$5 million, and will greatly enhance students' abilities to earn their degrees in a more timely fashion and with better attention to courses required for their majors, as well as enhance opportunities for employment and continuing graduate education. However, the combined investments in these areas as well as the faculty hiring plan—the latter being the university's first strategic priority since the inception of the 2014-15 Work Plan—would have to be deferred and/or scaled back significantly in light of such a reduction.

Furthermore, an alteration to the implementation schedule and/or composition of the carefully and meticulously planned strategic initiatives and programs that such a reduction would require would significantly impact expected outcomes and improvements to the performance measures as articulated in the Work Plan. This would include changes in the anticipated increases in retention and graduation rates, shortened time to degree, and reduced excess credit hours. In absence of these funds, UCF's commitment to achieving a 90 percent academic progress rate and a 70 percent six-year graduation rate in the next three years would be compromised, and hinders the university's ability to meet both community and statewide professional and workforce needs.

Harnessing predictive analytics, updating current advising software, focusing on program mapping and tracking to find appropriate pathways for student success, and leveraging university consortiums are several of the initiatives that will allow UCF to shift from cohort-based approaches to individualized student interventions that can predict and prevent certain student failures before they happen. In collaboration with a consultant, Civitas Learning, UCF is beginning to harness the power of this new field of analytics to deliver personalized, real-time recommendations designed to facilitate student completion. Additionally, the conversion of UCF's undergraduate degree advising/audit software from the present DARS system to PeopleSoft is a foundational initiative that is necessary to improve both student support and predictive analytics by providing a detailed view into course-taking patterns, allowing the university to redirect students onto a successful degree path. Partnerships such as DirectConnect to UCF, the Florida Consortium of Metropolitan Research Universities, the John N. Gardner Institute's Foundations of Excellence, and the University Innovation Alliance allow UCF to leverage best practices in student success by working hand-in-hand to scale up new interventions that have proven success records. Other initiatives include further financial and other investments in graduate fellowships and the continuation of the Targeted Education Attainment (TEAm) projects.

To ensure continued growth and quality of research and graduate activity, UCF plans to expand and enhance programs in focused areas. To this end, we are analyzing existing offerings to determine how well these programs meet the career goals of our students and the workforce needs of our area. Professional master's degrees are high on the list of possible new programs. We are also undertaking a program-by-program scrutiny of graduate admission requirements, acceptance rates, and productivity metrics.

These plans also include the hiring of research-intensive faculty members, the expansion of biomedical and clinical research, the development of new graduate medical education programs, and the development of new health-related programs that capitalize on College of Medicine partnerships. Increasing graduate activity also furthers the volume and economic impact of UCF research, building upon the \$1.1 billion in external research grants received in the past decade.



**University of Florida, including the Institute of Food and
Agricultural Sciences and the Health Science Center
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$15,700,647 + \$6,636,519 + \$5,182,608
Reduction Amount Lottery:	\$2,356,951 + \$626,694 + \$289,821
Reduction Total:	\$18,057,598 + \$7,263,213 + \$5,472,429 = \$30,793,240

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

In the five years prior to 2013, the net loss to the UF state budget amounted to \$59 million. This number included the cuts allocated by the Legislature and the additions derived from tuition increases. In order to address these cuts, UF pared instructional, research, and outreach services with the intent of increasing efficiencies while preserving essential functions. No units were spared serious scrutiny, few units were spared substantial cuts, and UF was scoured for efficiencies. In the course of this process, UF strived to maintain the quality of its programs and was largely successful. An additional \$30.1 million in cuts, if not offset by increased revenue from other sources, could not be spread across the university without significantly reducing quality, which would effectively stall the drive to achieve top 10 status among public research universities. Given the size of a 5% reduction, UF's only choice would be to select several large units and subunits for total elimination in order to assure the remaining units could maintain quality.

\$30.1 million exceeds the total state budget of several of UF's smallest colleges. To meet this reduction, UF would need to eliminate from the university one or more whole colleges or several

substantial segments of the large colleges and other budgetary units. Planning for such action would require careful consultation on the campus and with the BOT and an in-depth analysis of the consequences of the decisions on the instructional, research, and outreach portfolios of the university. That process cannot unfold before the due date for this report.

Consequences:

- (1) Students would no longer have the option to pursue the subjects and associated majors in colleges and subunits that had been eliminated.
- (2) The total faculty employed by the university would shrink significantly, resulting in a reduced workforce for instruction.
- (3) Student access to UF would decrease.
- (4) UF would lose the expertise of faculty in affected units. Thus, UF would not have all of the multidisciplinary expertise needed to drive the state's economic development.
- (5) With fewer faculty, UF's research productivity would decrease, resulting in fewer external grants and contracts. UF is awarded more than \$650 million annually. A decrease will represent lost economic opportunity in the State.
- (6) UF is the sole State of Florida institution that belongs to the AAU (Association of American Universities) that comprises the nation's top research universities. Whether or not UF could maintain that status after losing entire colleges is an open question. It would certainly make it extremely difficult for UF to succeed in its drive to the top 10 publics in the foreseeable future.

UF is committed to quality in discharging its mission as is evidenced by its preeminent status in the State of Florida. That commitment will not change. The strategy outlined above is the only one that would allow the university to maintain the quality of what it does to benefit the students, the State, and its citizens.



**University of North Florida
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$ 3,826,131
Reduction Amount Lottery:	\$ 639,179
Reduction Total:	\$ 4,465,310

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

Of the E&G budget, 77.0% is salaries and benefits, 4 % is utilities, and other operating expenses constitute the remaining 19%. This means that the only way to get to a 5% reduction in the University budget is to cut personnel.

The University would be forced to lay off 45 faculty members, at an average salary and benefits cost of \$85,000 for a total amount of \$3,825,000. This layoff would hamper growth in academic programs and research. The University would also have to reduce enrollment to maintain faculty-to-student ratios, reducing the number of available courses. One of the first places we would look for faculty and course reduction is to those internships which are not required by accrediting bodies. Regrettably, these are often the courses that connect our students to future employers and make them more competitive in the workforce.

With a decrease in enrollment, we would then look to proportionally reduce the workforce in the administrative and support areas by eliminating advisors, financial aid and other support positions. Several of these positions are those we are using to boost access and our retention and graduation rates.

The remaining amount needed to reach the 5% goal would be (1) a reduction in funds for faculty research labs and equipment which would negatively impact their productivity and ability to stay current in their fields, (2) a reduction in funds used to upgrade technology to stay competitive and relevant to instruction, and (3) a reduction in funds to provide services, learning and research resources to for students and faculty.



**University of South Florida System
Five Percent Reduction Plan
2015-2016 Legislative Budget Request**

Reduction Amount GR:	(\$14,925,476)
Reduction Amount Lottery:	(\$2,362,223)
Reduction Total:	(\$17,287,699)

	General Revenue	Lottery	Total
USF Tampa	(\$10,058,530)	(\$1,746,345)	(\$11,804,875)
USF St. Petersburg	(\$1,053,045)	(\$ 81,160)	(\$1,134,205)
USF Sarasota-Manatee	(\$ 626,472)	(\$ 67,234)	(\$ 693,706)
USF Health	(\$3,147,361)	(\$ 467,484)	(\$3,614,845)
Financial Assistance	(\$40,068)		(\$ 40,068)

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the board percentage reductions.)

A 5% reduction in appropriations would significantly impact the University of South Florida System requiring USF to eliminate many administrative, faculty, and staff positions. Services and programs (such as classes offered and advisors available) for students would be limited and our ability to enroll students would be hampered. Below are areas impacted and the related quantification:

Instruction - (\$8,168,441) - 47.3% of Total Reduction

- Reduce number of adjunct/visiting instructors creating large class sections further taxing faculty instructional capacity. Resulting in:
 - Increased faculty-student ratio.
 - Impact to the faculty's ability to produce research objectives.
 - Reduced summer school offerings.
- Suspension of new programs in areas of strategic emphasis.
- Program reductions.
- Reduce and/or cap enrollment.

Academic Support - (\$1,842,238) - 10.7% of Total Reduction

- Reduce staff support placing more direct burden on faculty for scheduling, procurement, HR support and office management.
- Reduce and/or eliminate support for academic programs.
- Reduce advising and academic support services.

University Support - (\$4,187,883) - 24.2% of Total Reduction

- Eliminate positions thus impeding delivery of core services such as oversight, compliance, responding to internal and external data requests, and reporting.
- Other areas impacted would be recruiting, maintenance, and technology support.

Research - (\$397,901) - 2.3% of Total Reduction

- Reduced or eliminated research support (laboratory technicians, post docs, and graduate students).

Student Services - (\$796,885) - 4.6% of Total Reduction

- Streamline and curtail services related to admitting, registering, counseling, career services and other services for both graduate and undergraduate students.

PO&M - (\$1,421,531) - 8.2% of Total Reduction

- Reduce service levels resulting in delays in major and minor construction projects, vehicle repairs, maintenance services, trash removal, mowing, custodial services, etc.
- Limit the ability to cover operational costs for utilities, equipment maintenance and fuel.
- Further delay in meeting deferred maintenance and upkeep.

Library Services - (\$473,120) - 2.7% of Total Reduction

- Reduce and/or eliminate programs developed by medical research librarians that teach students and faculty best practices for research and information management skills.
- Reduce library services and library hours.
- Freeze purchase of electronic medical book packages.



**UWF
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$3,090,751
Reduction Amount Lottery:	\$ 406,948
Reduction Total:	\$3,497,699

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

The University is focused on achieving the goals set forth in its performance improvement plan despite budget constraints resulting from the reductions that started in 2007 and which persisted over the course of many years. All together, the University absorbed a total reduction of \$33.8 million.

Additional reductions will have a significant negative impact on the ability of the University to achieve its performance improvement plan which is aimed at creating clear and visible paths for students to graduate and achieve their ultimate career goals.

The priority order of the functional areas targeted below are based on limiting as much as possible the impact any additional reductions would have on UWF's basic mission and the successful retention and graduation of our students. We emphasize that the following estimates are preliminary and are based on various projections. If actual reductions are required, the UWF may modify this plan.

Functional Areas Targeted and Priorities:

Priority Number One – Reduced institutional support including information technology support and infrastructure, and facilities; \$1,240,369

- (1) How the reduction will impact clients, agency operations, or other program areas:

- Fewer staff to respond to the ever increasing needs and requirements of the student body and academic departments.
 - Potential for limited hours of access to vital support services
 - Further increase to the level of deferred maintenance already impacted by lack of PECO funding.
 - Reduced support for process redesign initiatives that promote efficiency and effectiveness.
 - Reductions and delays in upgrading information technology infrastructure.
- (2) Justification for assigning relative priority for reduction:
- Based the priority on the degree to which student learning and engagement could be negatively impacted.
- (3) What calculation methodology was used for reduction issues:
- Historical cost.
- (4) Whether a statutory change is required to implement:
- No.
- (5) An explanation of distribution methodologies used to distribute the reduction to other entities:
- NA

Priority Number Two – Reduced support for educational outreach, public service, regional economic development, research activities, and student support services; \$1,559,389

- (1) How the reduction will impact clients, agency operations, or other program areas:
- Inability to fully implement the “Statewide Complete Florida Degree Program” funded in 2013-2014.
 - Reduced advising services both face-to-face and via distance learning.
 - Reduced funding for student employment opportunities.
 - Delays in graduates moving to the workforce and potentially slowing the state and region’s economic recovery.
 - Diminished opportunities to support economic growth in key areas by reduced support for workforce development and continuing education.
 - Reduced opportunities to engage in community and regional partnerships, including those with the military that drive economic growth in the region.
 - Reduced funding for graduate assistantship positions and other applied learning opportunities for students.

- Inability to respond to new initiative opportunities to support regional employer needs and growth in key areas.
 - Inability of centers and institutes to effectively compete for external funding.
 - Reduced funding for programs that support and enhance campus diversity.
 - Elimination of student support important to creating interactive and effective distance learning experiences.
- (2) Justification for assigning relative priority for reduction:
- Based the priority on the degree to which student learning and engagement could be negatively impacted.
- (3) What calculation methodology was used for reduction issues:
- Historical cost.
- (4) Whether a statutory change is required to implement:
- No.
- (5) An explanation of distribution methodologies used to distribute the reduction to other entities:
- NA

Priority Number Three – Reduced support for academic programs including a reduction in the numbers of full-time faculty and adjunct instructors; \$697,941

- (1) How the reduction will impact clients, agency operations, or other program areas:
- Reduced student retention and graduation rates.
 - Fewer course offerings resulting in delayed student graduation.
 - Inability to recruit and retain qualified faculty having a negative impact on student learning outcomes.
 - Larger class sizes resulting in less opportunity for student and faculty interactions.
 - Reductions and delays in replacing computer lab equipment and upgrading classroom technology.
 - Reduced access to programs, courses, and services delivered at all campuses including the Emerald Coast campuses.
 - Increased student-to-faculty ratios.
 - Increased probability of courses being taught by adjuncts because of reduced numbers of full-time faculty.
 - Reduced ability to maintain services at current levels at the Emerald Coast
- (2) Justification for assigning relative priority for reduction:
- Based the priority on the degree to which student learning and engagement could be negatively impacted.
- (3) What calculation methodology was used for reduction issues:

- Historical cost.
- (4) Whether a statutory change is required to implement:
- No.
- (5) An explanation of distribution methodologies used to distribute the reduction to other entities:
- NA



**Florida Virtual Campus
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$ (1,141,440)
Reduction Amount Lottery:	\$
Reduction Total:	\$ (1,141,440)

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

A five percent reduction in appropriations to the Florida Virtual Campus (FLVC) would further diminish the organization's services to students, libraries, colleges, and universities. This reduction in revenue would result in an overall decrease in the services provided by FLVC. For example, it could necessitate a decrease in the FLVC service desk hours, affecting the availability of technicians to assist students and staff when help is needed. The reductions would also affect centralized services to libraries, such as data loading for the statewide Integrated Library System and statewide digital program, causing problems at college and university libraries and affecting their ability to work and assist students. Distance learning and student services would also be affected by the reductions, negatively impacting services such as support for the transient student admissions process and the online course catalog. Lastly, a reduction in appropriations could result in a reduction in statewide e-resources, affecting the amount of electronic materials available to higher education students.



**Institute Human and Machine Cognition
5% Reduction
2015-2016 Legislative Budget Request**

Reduction Amount GR:	\$ 136,959
Reduction Amount Lottery:	\$
Reduction Total:	\$ 136,959

(Pursuant to the State of Florida Legislative Budget Instructions for FY 2015-2016, reductions must be program/issue specific and cannot simply be across-the-board percentage reductions.)

If a five percent (5%) reduction is necessary, IHMC would exercise these reductions by reducing the number and type of research internships and work opportunities offered to graduate and undergraduate students in Pensacola and Ocala.



**Moffitt Cancer Center
5% Reduction
2015-16 LBR**

Reduction Amount GR:	\$528,847
Reduction Amount Lottery:	\$0
Reduction Total:	\$528,847

(Pursuant to the State of Florida Legislative Budget Instructions, reductions must be program/issue specific and cannot simply be across-the board percentage reductions.)

-A reduction of 5% would jeopardize funding for approximately 60 Post-Doctoral Researcher & Clinical Residency students. These students are paid a salary and receive benefits while they are training at Moffitt. Moffitt is not paid any tuition for these students.

-By 2020, the United States will have half of the needed oncologists. It has been proven that 65% of residents stay and work within in the state they train. Unfortunately, Florida has the highest rate of cancer incidence in the nation; it is vital that we maintain our oncology residents in order to combat Florida's burden of cancer.

**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Budget and Finance Committee
September 18, 2014**

SUBJECT: 2015-2016 Board General Office Legislative Budget Request

PROPOSED COMMITTEE ACTION

Approve the 2015-2016 Board General Office and allow the Chancellor to make technical changes as necessary.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution; Section 216.023 Florida Statute

BACKGROUND INFORMATION

Annually, the Board of Governors must prepare and submit a Board General Office Legislative Budget Request (LBR) for operating funds to the Legislature and Governor by October 15. The budget must be reviewed and recommendations made on the issues to be included in the 2015-2016 LBR. In accordance with Subsection 216.023(1), Florida Statutes, this LBR is based on an independent judgment of needs and will be presented to the Legislature and Governor by the statutory due date.

The Board General Office requests a continuation budget of \$7.7 million to support 63 positions and associated operating expenses.

The Chancellor recommends approval of the Board General Office LBR and requests authority to make technical changes as necessary.

Pursuant to the legislative budget instructions, each agency must prepare a five percent reduction plan. The Board General Office plan is included for information purposes.

Supporting Documentation Included: 2015-16 LBR

Facilitators/Presenters: Tim Jones



Florida Board of Governors General Office 2015-2016 Legislative Budget Request

Continued funding of \$7.7 million is needed to support the 63 authorized positions and associated operating expense for the Board Office. The operating expense covers the costs associated with employee salaries and benefits, data collection and management, Board meeting expenses, travel expenses, contractual obligations and basic office supplies.

2015-2016 Legislative Budget Request		
		Total
1	2014-15 Total Budget (63 Positions plus operating expenses)	\$8,209,301
2	Less: Board Administrative Workload (non-recurring)	(\$22,638)
3	Less: FAMU/FSU Engineering School study (non-recurring)	(\$500,000)
4	2015-16 Start-up Budget	\$7,686,663
5		
6	No additional funding requested	\$0
7		
8	Total	\$7,686,663
9	Increase over the Start-up Budget	\$0
10	% Increase over the Start-up Budget	0%

**Florida Board of Governors General Office
5 Percent Reduction Plan
Fiscal Year 2015-2016**

The General Office budget of \$7.6 million is predominately salaries and benefits (82%) to support 63 authorized positions. The remaining 18 percent of the budget includes support for office activities (such as; Turlington Building rent payments, data collection/support, travel for staff and board members, office supplies) and pass-through funds to the Northwest Regional Data Center and to the Department of Management Services for human resource services and risk management.

The Board Office has created a three-part accountability system that includes a Strategic Plan, University Work Plans, and an Accountability report. Tremendous work goes in the collection and analysis of data to provide information to key stakeholders so that strategic investments and decisions can be made about the university system. The Board Office has been fortunate to receive the appropriate financial support needed to ensure the success of these critical areas.

A five percent budget reduction would total approximately \$384,333 and hamper the progress that has been made in moving the office forward to ensure a successful three-part accountability system. Strategic decisions would need to be made on which areas of the budget to be reduced.

For planning purposes basic operating costs could be reduced by approximately \$115,800, which may include: travel for staff and travel reimbursements to university personnel who participate in educational plant surveys throughout the fiscal year - \$70,000; training and professional development for staff - \$15,000; operating capital outlay totaling \$5,800; and elimination of student OPS support of \$25,000.

Since there are insufficient operating expenses to absorb the full five percent reduction, the balance of \$268,533 would come from the elimination of positions. Six new positions were provided to the Board for the 2014-2015 fiscal year in the following areas: Innovation and Online Education, the Office of Inspector General, Office of the Corporate Secretary/General Counsel and the Budget and Finance Office. As of August 18, one position has been filled, with two of the vacant positions being advertised and scheduled to close by the end of August. All office positions should be filled within the next 6 months. Therefore, to achieve the reduction of \$268,533, at least three positions would need to be eliminated. These reductions would be made strategically to have the least impact to the Board Office.

