



Performance-Based Funding 2023-2024

Budget & Finance Committee
Eric Silagy, Chair

June 22, 2023
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Performance Funding – A Look Back



- 2012 – Chair Colson charged the Budget & Finance Committee with creating a performance-based funding model
- 2012-2013 – Budget & Finance Chair Tom Kuntz led the development of the model
- January 2014 – Board approved a model under Chair Hosseini’s Leadership
- 2016 – Chair Hosseini supported the creation of Section 1001.92, Florida Statute – State University System Performance-Based Incentive
- September 2016 - Board Regulation 5.001 – Performance-based Funding created

Performance-based Funding Metrics



1. Percent of Bachelor's Graduates Employed (Earning \$40,000+) or Continuing their Education	6. Bachelor's Degrees Awarded in Areas of Strategic Emphasis
2. Median Wages of Bachelor's Graduates Employed Full-Time	7. University Access Rate (Percent of Undergraduates with a Pell-grant)
3. Average Cost to the Student (Net Tuition per 120 Credit Hours)	8a. Graduate Degrees Awarded in Areas of Strategic Emphasis 8b. Percent of Newly Admitted FTICs with a HS GPA of 4.0 or Higher (NCF only)
4. Four Year Graduation Rate (Full-time FTIC)	9a. Three Year Graduation Rate for FCS AA Transfer Students 9b. 6-Year Graduation Rate for Students Awarded Pell Grants 9b.1. Academic Progress Rate for Pell Students (FL Poly only)
5. Academic Progress Rate (2nd Year Retention with GPA Above 2.0)	10. Board of Trustees Choice

Year 1 of Performance Funding Excellence Scores



Metric	FAMU	FAU	FGCU	FIU	FSU	NCF	UCF	UF	UNF	USF	UWF	Highest Benchmark
1	60%	70%	70%	67%	61%	44%	69%	63%	69%	69%	60%	75%
2	\$30,000	\$34,900	\$32,900	\$35,100	\$30,300	\$21,200	\$33,700	\$33,100	\$24,200	\$34,600	\$31,000	\$40,000
3	\$37,950	\$32,430	\$29,240	\$26,730	\$25,500	\$74,640	\$21,010	\$24,940	\$29,350	\$24,340	\$31,080	\$20,000
4	41%	40%	43%	50%	77%	66%	66%	86%	49%	62%	42%	70%
5	72%	70%	72%	78%	90%	81%	86%	96%	76%	87%	63%	90%
6	43%	40%	35%	40%	35%	56%	35%	47%	33%	46%	39%	50%
7	65%	41%	35%	47%	30%	29%	38%	32%	36%	41%	39%	30%
8A 8B	39%	33%	36%	40%	31%	35%	47%	59%	34%	57%	29%	50%
9	31%	31%	74%	70%	11	4	60%	18	71%	56%	65%	80% FSU 25 UF 31 NCF 5
10	86%	42%	23%	5,851	115	100%	12,321	\$697 M	9%	300	32%	
<i>BOT Choice</i>	80%	40%	20%	6,100	75	100%	12,300	Top 1/3 of AAU	7%	300	21%	

Score of 4-5

Score of 3

Score of 2-0

Year 10 of Performance Funding Excellence Scores

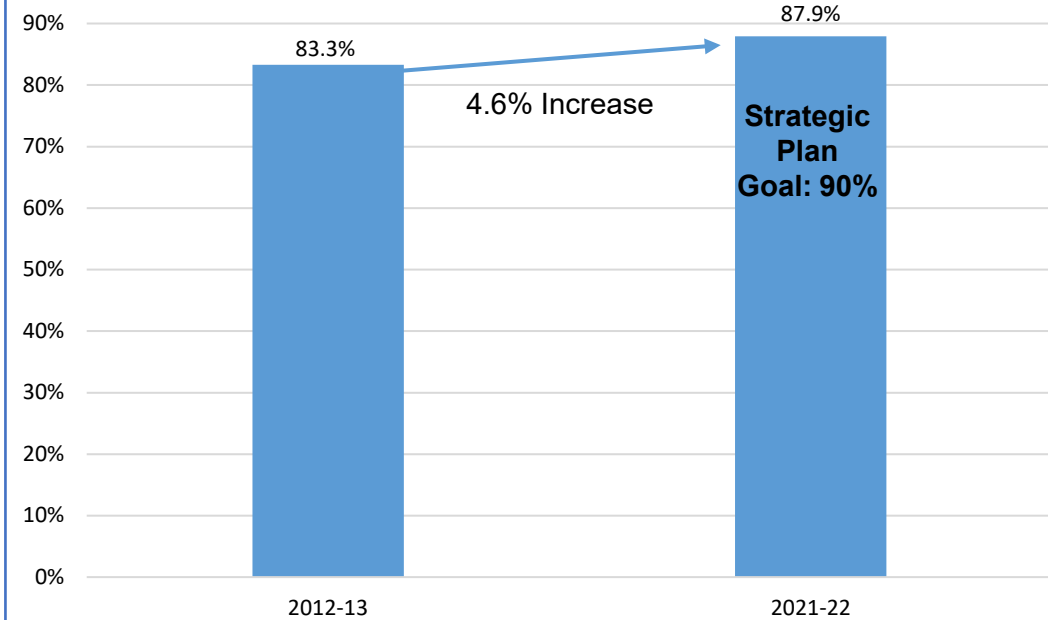


Metric	FAMU	FAU	FGCU	FIU	FL POLY	FSU	NCF	UCF	UF	UNF	USF	UWF	Highest Benchmark
1	67.8%	69.0%	63.9%	72.8%	75.6%	71.1%	50.4%	65.9%	76.7%	69.1%	67.4%	74.1%	80.0%
2	\$39,500	\$45,300	\$44,200	\$44,900	\$54,800	\$44,100	\$34,900	\$45,900	\$51,200	\$45,500	\$44,100	\$48,800	\$40,700
3	(\$17,750)	\$1,680	\$4,840	(\$1,630)	(\$13,610)	(\$4,250)	(\$14,510)	(\$370)	(\$5,550)	\$570	(\$5,980)	\$1,370	\$9,000
4	28.4%	49.4%	42.2%	59.8%	41.0%	74.0%	58.3%	54.8%	75.3%	50.6%	64.8%	47.0%	65%
5	82.8%	77.7%	78.0%	88.8%	75.3%	92.9%	75.0%	91.5%	94.4%	74.9%	86.8%	83.5%	90%
6	51.8%	61.3%	52.8%	59.0%	100.0%	52.1%	50.6%	55.3%	60.6%	68.0%	68.4%	62.4%	50%
7	56.8%	38.7%	31.1%	50.3%	34.9%	26.0%	30.0%	35.7%	23.4%	32.3%	35.4%	35.5%	42%
8A 8B	50.0%	67.5%	50.5%	61.5%	100.0%	56.9%	55.1%	56.0%	67.3%	56.8%	70.2%	71.1%	8A 60%, 8B 70%
9A	61.6%	60.0%	57.8%	71.9%	27.8%	75.9%	58.1%	54.1%	68.5%	61.3%	63.7%	58.5%	70%
9B 9B1	57.4%	61.4%	55.7%	68.6%	74.5%	82.7%	57.4%	70.8%	85.0%	61.5%	73.0%	50.6%	9B 80% 9B1 89%
10	341	62	944	278	98.6%	1298	93.0%	41.2%	2276	49.1%	73.7%	58.6%	
	350	\$75 M	820	271	76%	1360	67%	40%	2600	27%	74%	51%	
	Score of 10-8 Score of 4-5 (M9)			Score of 7-5 Score of 3 (M9)			Score of 4-0 Score of 2-0 (M9)						

Performance Funding Improvement Retention and Graduation Rates



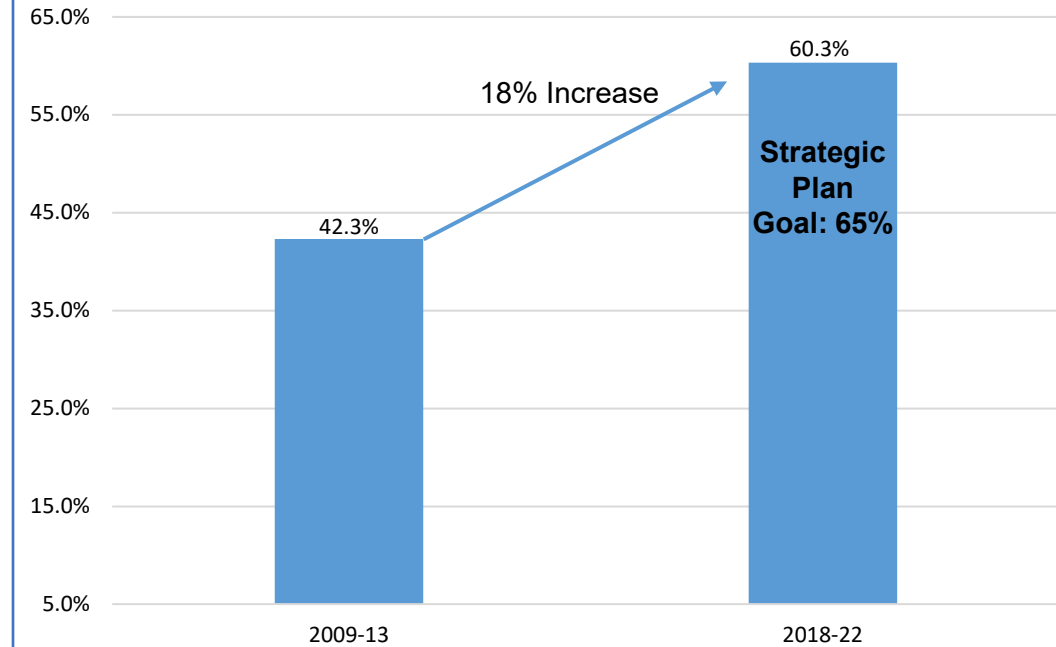
Metric 5: Academic Progress Rate
2nd Year Retention w/ GPA above 2.0



Notable improvements:

- FL Poly: 11% increase (from 64% to 75%)
- UWF: 3% increase (81% to 84%)

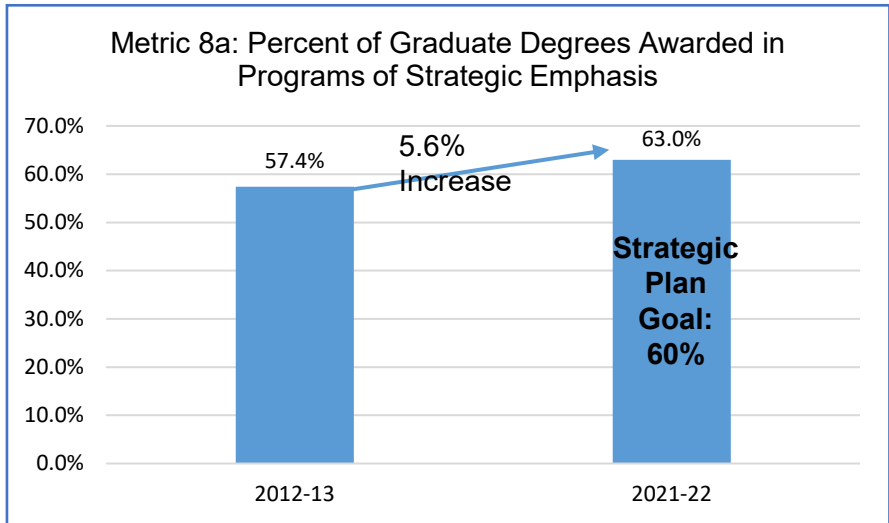
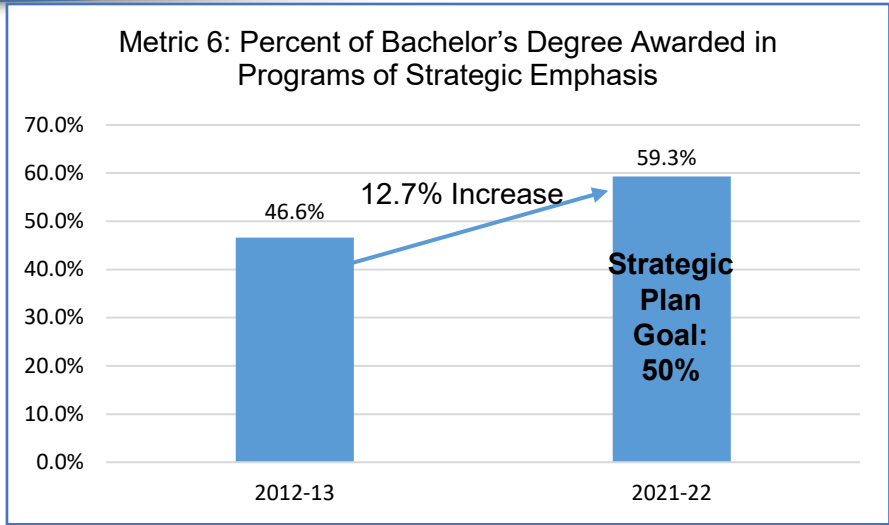
Metric 4: 4 Year Grad Rate



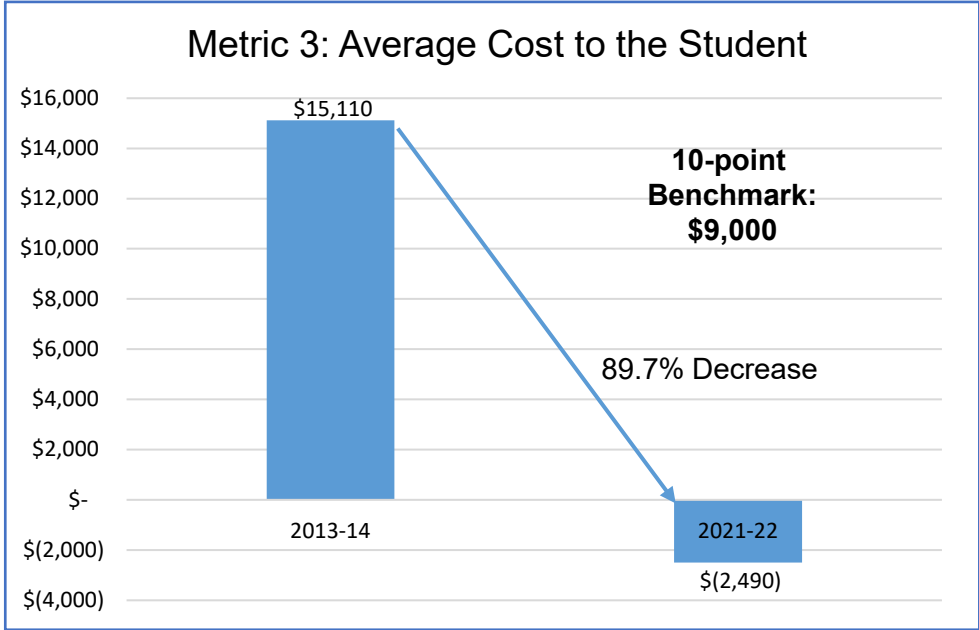
Notable improvements:

- UCF: 5% increase (from 50% to 55%)
- NCF: 3% increase (from 55% to 58%)
- FL Poly: 3% increase (from 38% to 41%)

Performance Funding Improvement Degrees and Cost to the Student



All of the SUS Averages for these metrics are exceeding the Strategic Plan Goals and/or 10-point Benchmarks.



Changes to Metrics This Year

Approved November 2022



- **Metric 1** – *Percent Bachelors Graduates Employed or Enrolled 1 Year after Graduation:*
Raised the wage threshold from \$30,000 to \$40,000 and changed denominator.
- **Metric 8a** – Graduate Degrees Awarded in Areas of Strategic Emphasis
FL Poly now included in this metric (previously included in 8b).
- **Metric 8b** – Freshmen in Top 10% of Graduating High School Class
Changed metric to: Percentage of Newly Admitted FTICs with High School GPA of a 4.0 or Higher. This metric includes NCF only.
- **Metric 9a** – Two-Year Graduation Rate for FCS Associate in Arts Transfer Students
Changed metric to: Three-Year Graduation Rate for FCS Associate in Arts Transfer Students.

Performance Funding Model 2023-24

Metric 1 Data



Percent of Bachelors Graduates Employed (earning \$40,000+) or Enrolled 1 Year after Graduation

The metric's wage threshold changed from \$30,000 to \$40,000 and the denominator was changed.

Data:

	FAMU	FAU	FGCU	FIU	FL POLY	FSU	NCF	UCF	UF	UNF	USF	UWF	SUS	
Old	\$30,000	70.4	69.8	70.5	71.3	71.8	72.6	49.4	68.9	74.1	72.4	70.2	75.0	71.1
New	\$40,000	67.8	69.0	63.9	72.8	75.6	71.1	50.4	65.9	76.7	69.1	67.4	74.1	70.0
	Difference	-2.6	-0.8	-6.6	1.5	3.8	-1.5	1.0	-3.0	2.6	-3.3	-2.8	-0.9	-1.1

Performance Funding Model 2022-23

Metric 1 Scores



Metric 1: Percent of Bachelors Graduates Employed (earning \$40,000+) or Enrolled 1 Year after Graduation

Univ.	Former Metric 1 2023*	Current Metric 1 2023	Under Former Metric 1
FAMU	10	10	
FAU	10	8	-2
FGCU	10	10	
FIU	10	9	-1
FL Poly	7	8	
FSU	10	8	-2
NCF	0	0	
UCF	10	9	-1
UF	8	8	
UNF	10	10	
USF	10	7	-3
UWF	8	8	

*Using current year data to score former Metric 1 with the former denominator and the \$30,000+ wage threshold, 5 universities lost points.

Performance Funding Model 2022-23

Metric 9a Benchmarks & Data



Benchmarks:

Two-Year Graduation Rate for FCS Associate in Arts Transfer Students updated to Three-Year Graduation Rate for FCS Associate in Arts Transfer Students

		5	4	3	2	1
2-Year	2022-23 Benchmarks	50.0	45.0	40.0	35.0	30.0
3-Year	2023-24 Benchmarks	70.0	67.0	64.0	61.0	58.0

Data:

	FAMU	FAU	FGCU	FIU	FL POLY	FSU	NCF	UCF	UF	UNF	USF	UWF	SUS
2-Year	39.0	47.0	40.2	56.5	0.0*	56.9	21.2*	30.1	44.5	45.9	48.9	34.0	44.4
3-Year	61.6	60.0	57.8	71.9	27.8	75.9	58.1	54.1	68.5	61.3	63.7	58.5	62.9

Note*: FL Poly and NCF rate is the average for last three cohorts.

Performance Funding Model 2023-24

Metric 9a Scores



Metric 9a: Three-Year Graduation Rate for FCS Associate in Arts Transfer Students

Univ.	Former Metric 9a 2023*	Current Metric 9a 2023	Under Former Metric 9a
FAMU	2	2	
FAU	4	1	-3
FGCU	3	1	-2
FIU	5	5	
FL Poly	0	0	
FSU	5	5	
NCF	0	1	
UCF	1	0	-1
UF	3	4	
UNF	4	2	-2
USF	4	2	-2
UWF	1	2	

*Using current year data to score former Metric 9a, 5 universities lost points.

Regulation 5.001 - Institutional Investment - Less than 60 points



- Minimum point threshold of 60 points
- If less than 60 points, the institutional investment is held in reserve by the Board
 - University submits an Improvement Plan to the Board in August for approval
 - University submits a monitoring report to the Board in December and May
 - December monitoring report will be considered at the January Board meeting
 - If approved, up to 50% of the institutional investment will be released
 - May monitoring report will be considered at the June Board meeting
 - If approved, the balance of the institutional investment will be released
 - If not approved, remaining institutional investment goes to the 3 institutions that demonstrate the most improvement on the metrics

Regulation 5.001 – State Investment – 2 Consecutive Years of Decline



- An institution with a lower score than the previous year's score for 2 consecutive years must submit a Student Success Plan (Plan)
 - The State Investment is held in reserve by the Board
- Plan submitted to the Board for consideration at the September meeting
 - If approved by the Board, up to 50 percent shall be released
- A monitoring report shall be submitted at a time designated by the Chancellor
- The monitoring report shall be considered by the Board during the March meeting
 - If approved by the Board, up to the remaining balance of the State Investment shall be released
 - If not approved, the balance of the state investment shall be distributed to the top 3 scoring institutions

Regulation 5.001 - State Investment – Less than 70 points



- An institution with a score lower than 70 is only eligible to receive up to 50% of their State Investment. The other 50% shall be distributed to the top 3 scoring institutions
- The institution with a score lower than 70, must submit a Student Success Plan (Plan)
- Plan is submitted to the Board for consideration at the August meeting
 - If approved by the Board, up to half of the 50% shall be released
- A monitoring report shall be submitted at a time designated by the Chancellor
- The monitoring report shall be considered by the Board during the March meeting
 - If approved by the Board, up to the balance of the 50% of the State Investment shall be released
 - If not approved by the Board, the balance shall be distributed to the top 3 scoring institutions

2023-24 Performance Funding Scores



Scores are normalized for Metrics 1 and 9a changes:

Univ.	2021 Score	2022 Score	2023 Score	Metric 1 & 9a Normalized	Updated 2023 Score	Status
FAMU	79 / 82	69 / 72	78		78	Increase
FAU	89 / 91	71 / 80	77	+5	82	Increase
FGCU	82 / 85	65 / 71	72	+2	74	Increase
FIU	97 / 99	88 / 91	94	+1	95	Top 3 ★
FL Poly	83	63 / 66	86		86	Increase
FSU	88 / 88	86 / 90	92	+2	94	Top 3 ★
NCF	64 / 73	60 / 66	65		65	below 70
UCF	87 / 92	79 / 88	87	+2	89	increase
UF	87 / 90	89 / 93	90		90	Top 3 ★
UNF	77 / 83	70 / 78	77	+2	79	Increase
USF	94 / 96	87 / 92	85	+5	90	Top 3 ★
UWF	83 / 83	78 / 81	82		82	Increase

Score below 70: If a university's score is lower than 70 points, the university may receive up to 50% of their allocation of the state investment after presenting/ implementing a student success plan. **NCF's score dropped below 70.**

Drop (2 years): If a university's score decreases for 2 consecutive years, the university may receive up to 100% of their allocation of the state investment after presenting/ implementing a student success plan. No scores dropped 2 years.

Watch List: If a university's score decreases for 2 consecutive years, the university may receive up to 100% of their allocation of the state investment after presenting/ completing a student success plan. Universities on the watch list have a drop in score for 1 year. No universities are on the watch list this year.

Top 3: The remaining funds of each institutions' state's investment shall be distributed to the top three scoring institutions (including ties) based on the total number of points of the top three scoring eligible institutions. **FIU, FSU, UF and USF tie for top 3.**

Student Success Plans



- NCF shall:
 - Submit a student success plan to the Board for consideration at the **August** 2023 meeting. The plan should specify the activities and strategies for improving the institution's performance metrics.
- If the plan is approved:
 - **NCF shall receive up to 25%** of their state's investment at the time of approval.

Univ.	Initial Allocation	Eligible Allocation
NCF	\$4,396,051	\$2,198,026

- The Board will monitor the progress on implementing the activities and strategies specified in the plan.
- Monitoring reports for each institution will be considered by the Board at the **March** 2024 meeting and if it is determined that the institution is making satisfactory progress on implementing the plan:
 - NCF shall receive up to the balance of 50% of their state's investment.
- Any institution that fails to make satisfactory progress shall not have its eligible amount of state's investment restored.
- Any state investment funds remaining shall be distributed to the top three scoring institutions (FIU, FSU, UF and USF) based on the total number of points of the top three scoring eligible institutions (including ties).

2023-24 Performance Funding Allocation

June 2023



	Original Score	Updated Score w/ Normalizing	June 2023 Allocation - PENDING				August 2023 - PENDING	March 2024 - PENDING	Final State Investment Allocation	Final Total Allocation
			Institutional Investment Allocation	State Investment Allocation	Top 3 State Investment Allocation	State Investment Allocation held in reserve	State Investment Allocation Maximum*	State Investment Allocation Maximum*		
FAMU	78	78	\$13,438,040	\$15,943,438					\$15,943,438	\$29,381,478
FAU	77	82	\$21,265,474	\$25,230,224					\$25,230,224	\$46,495,698
FGCU	72	74	\$12,253,765	\$14,538,365					\$14,538,365	\$26,792,130
FIU	94	95	\$32,836,760	\$38,958,867	\$565,887				\$39,524,754	\$72,361,514
FL Poly	86	86	\$4,944,006	\$5,865,769					\$5,865,769	\$10,809,775
FSU	92	94	\$48,517,371	\$57,562,983	\$559,930				\$58,122,913	\$106,640,284
NCF	65	65	\$3,705,243	\$0		\$2,198,026	\$1,099,013	\$1,099,013	\$2,198,026	\$5,903,269
UCF	87	89	\$35,410,573	\$42,012,544					\$42,012,544	\$77,423,117
UF	90	90	\$57,527,517	\$68,252,986	\$536,104				\$68,789,090	\$126,316,607
UNF	77	79	\$13,379,105	\$15,873,514					\$15,873,514	\$29,252,619
USF	85	90	\$41,839,051	\$49,639,553	\$536,104				\$50,175,657	\$92,014,708
UWF	82	82	\$9,883,095	\$11,725,706					\$11,725,706	\$21,608,801
Total			\$295,000,000	\$345,603,949	\$2,198,025	\$2,198,026	\$1,099,013	\$1,099,013	\$350,000,000	\$645,000,000

*Allocation amounts must be determined and approved by the Board.



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Performance Based Recruitment and Retention Funding 2023-2024

Budget & Finance Committee
Eric Silagy, Chair

June 22, 2023
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Recruitment and Retention Funds



- **2023-24 General Appropriations Act:**

From the funds in Specific Appropriation 143, \$100,000,000 is provided for the State University System Performance Based Recruitment and Retention Incentive. These funds should be allocated based on the maximum number of excellence points using the data from the 2023 Accountability Plan. The Board of Governors shall provide guidance to ensure these funds are used for the recruitment and retention of full-time instruction and research personnel. Universities that receive preeminence funding in Fiscal Year 2023-2024 are not eligible to receive these funds.

Recruitment and Retention Incentive Allocation



Univ.	Metrics with Maximum Excellence Score	Total Number of Metrics with Maximum Excellence Scores
FAMU	Metrics 3, 6, 7	3
FAU	Metrics 2, 3, 6, 8	4
FGCU	Metrics 2, 3, 6, 10	4
FIU	Metrics 2, 3, 6, 7, 8, 9a, 10	7
FL Poly	Metrics 2, 3, 6, 8, 10	5
NCF	Metrics 3, 6, 10	3
UCF	Metrics 2, 3, 5, 6, 10	5
UNF	Metrics 2, 3, 6, 10	4
UWF	Metrics 2, 3, 6, 8, 10	5
Total		40

Univ.	Award Amount
FAMU	\$7,500,000
FAU	\$10,000,000
FGCU	\$10,000,000
FIU	\$17,500,000
FL Poly	\$12,500,000
NCF	\$7,500,000
UCF	\$12,500,000
UNF	\$10,000,000
UWF	\$ 12,500,000
Total	\$100,000,000



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