



STATE
UNIVERSITY
SYSTEM
of FLORIDA
Board of Governors

AGENDA
Strategic Planning Committee

University of Central Florida
Live Oak Center, Ferrell Commons
4000 Central Florida Boulevard
Orlando, Florida 32816
June 19, 2012, 1:00 p.m. - 5:15 p.m.
June 20, 2012, 8:30 a.m. - 5:00 p.m.

Chair: John Rood
Members: Caruncho, Colson, Frost, Perez, Yost

- | | |
|---|--------------------|
| 1. Call to Order and Opening Remarks | Governor John Rood |
| 2. Approval, Committee Minutes:
Minutes, March 22, 2012
Minutes, April 5, 2012 | Governor Rood |
| 3. Consideration of 2012-13 University Work Plans | Governor Rood |
| 4. Next Steps and Closing Remarks | Governor Rood |

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**STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
June 19, 2012**

SUBJECT: Approval of Minutes for Meetings held March 22, 2012 and April 5, 2012

PROPOSED COMMITTEE ACTION

Approval of minutes of meetings held on March 22, 2012, at the University of North Florida, Jacksonville; and on April 5, 2012 via telephone conference call.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Not Applicable

BACKGROUND INFORMATION

Committee members will review and approve the minutes for the meetings held on March 22, 2012, at the University of North Florida, Jacksonville; and on April 5, 2012 via telephone conference call.

Supporting Documentation Included: Minutes: March 22, 2012; April 5, 2012

Facilitators/Presenters: Governor Rood

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MINUTES
STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
STRATEGIC PLANNING COMMITTEE
UNIVERSITY OF NORTH FLORIDA
JACKSONVILLE, FLORIDA
MARCH 22, 2012

Governor Chris Corr, Chair, convened the meeting of the Strategic Planning Committee at 8:48 a.m. Members present were Vice-Chair John Rood, Dean Colson, Patricia Frost, Ava Parker, Tico Perez, and Rick Yost.

1. Call to Order and Opening Remarks

Governor Corr called the meeting to order.

2. Approval of Minutes from January 18, 2012

Mr. Colson moved that the Committee approve the minutes of the meeting held January 18, 2012 as presented. Dr. Yost seconded the motion, and members of the Committee concurred.

3. Strategic Planning and Accountability

Governor Corr asked staff to provide a background presentation on the creation of the State University System Strategic Plan, approved in November 2011. The presentation included information with regard to annual accountability reporting, the criticality of viewing the Board's strategic planning tools as living and evolving documents, the Strategic Plan's creation of nine goal areas and 28 performance indicators associated with those goals, other metrics that may be associated with the Board's tools given recent legislation, and the University Work Plan template as currently organized and drafted.

Following this presentation, a wide-ranging discussion with regard to strategic planning ensued, involving Board members, university presidents, and the Chancellor. Major points surrounding this discussion included:

- The Board's accepting the challenge of defining and aligning university missions.
- The concept of the Board's formally approving the coming year's portion of University Work Plans while identifying items in out-years that would need further conversation and consideration.

- The concept of identifying a set of accountability metrics applicable to all universities, a set applicable to research universities, and institution-specific metrics.
- The need to address input as well as output and outcome metrics, and to understand the gap between year 2025 goals and the likelihood of achieving those goals at current rates of investment.
- The need to simplify accountability reporting in order to focus on key goals and understand each university's unique contribution to those goals.
- Concerns expressed by the Council of Academic Vice Presidents relative to the calculation of certain of the metrics and the extent to which the metrics will be used.
- The extent to which University Work Plans need to articulate the impact if tuition differential requests are not approved.
- The extent to which conversations relative to baccalaureate access in Florida need to include the State Board of Education and the Florida College System.
- The extent to which the Board's Strategic Plan can be relevant given the current absence of facilities funding through Public Education Capital Outlay dollars, and the need to find new ways to finance construction of new facilities.
- The extent to which strategic planning discussions might be driven by the questions of how much should be spent on an individual student, and what percentage of that cost should be borne by that student.

4. Next Steps and Closing Remarks

After discussion, Mr. Colson made a motion that the Committee would hold a conference call to finalize the University Work Plan template; that the template would accommodate a set of metrics applicable to all universities, a set applicable to research universities, as well as institution-specific metrics from which universities could choose. Staff would also work with the Council of Academic Vice Presidents to refine the metrics and finalize the template. Ms. Frost seconded the motion, and the members of the Committee concurred.

Having no further business, the meeting was adjourned at 10:26 a.m.

MINUTES
STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
STRATEGIC PLANNING COMMITTEE
VIA TELEPHONE CONFERENCE CALL
TALLAHASSEE, FLORIDA
APRIL 5, 2012

Governor Chris Corr, Chair, convened the meeting of the Strategic Planning Committee at 11:04 a.m. Members present were Vice-Chair John Rood, Joseph Caruncho, Dean Colson, Patricia Frost, Tico Perez, and Rick Yost.

1. Call to Order and Opening Remarks

Governor Corr called the meeting to order.

2. Approval of 2012 State University System Work Plan Template

The Board of Governors Strategic Planning Committee met for the single purpose of approving the template for the University Work Plan submissions, due to the Board at its June 2012 meeting. Changes to the Work Plan took into account the creation a set of metrics applicable to all institutions, a set applicable to research institutions, and institution-specific metrics. In addition to the creation of a “Strategies” section, an “Areas of Emphasis” section was created revolving on themes of academic quality, operational efficiency, and return on investment. Technical adjustments to the template were discussed. Mr. Rood made a motion to approve the Work Plan template with technical adjustments discussed during the meeting. Mr. Colson seconded the motion, and the members of the Committee concurred.

3. Other Items for Consideration

Members had no other items to bring before the Committee.

4. Next Steps and Adjournment

Staff were directed to finalize the template as amended for technical adjustment and to distribute the template to the universities as soon as possible.

Having no further business, the meeting was adjourned at 12:11 p.m.

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STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
Strategic Planning Committee
June 19-20, 2012

SUBJECT: 2012-13 University Work Plans

PROPOSED COMMITTEE ACTION

Consider for approval those portions of University Work Plans associated with the 2012-13 academic year, and note out-year portions of University Work Plans that need to be the subject of further dialogue and deliberation.

AUTHORITY FOR BOARD OF GOVERNORS ACTION

Article IX, Section 7, Florida Constitution; Subsection 1007.25(8), Florida Statutes; Board of Governors Regulation 2.002

BACKGROUND INFORMATION

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

The University Work Plan's "Strategy" section includes institutional mission and vision statements, identification of strengths and opportunities, and key initiatives and investments. The "Key Performance Indicators" section provides metrics common to all universities, as well as a set specific to research universities, and institution-specific indicators. The "Operations" section provides fiscal information, including that associated with tuition differential requests, enrollment planning, and intentions of implementing new academic programs in 2012-13 and in the years 2013-15.

Universities will make brief presentations on their Work Plans, after which Committee members will have the opportunity to engage in discussion and questioning. The

Committee will consider for approval those portions of 2012-13 University Work Plans associated with the 2012-13 academic year, and note out-year portions of University Work Plans that need to be the subject of further dialogue and deliberation.

Supporting Documentation Included:	Individual 2012-2013 University Work Plans
Facilitators / Presenters:	Chair Rood; University Representatives

FAMU

2012-13 Work Plan



Florida A&M University

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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- b. Vision Statement
- c. Statement of Strategy
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2. KEY PERFORMANCE INDICATORS

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

3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

Florida Agricultural and Mechanical University (FAMU) is an 1890 land-grant institution dedicated to the advancement of knowledge, resolution of complex issues and the empowerment of citizens and communities. The University provides a student-centered environment consistent with its core values. The faculty is committed to educating students at the undergraduate, graduate, doctoral and professional levels, preparing graduates to apply their knowledge, critical thinking skills and creativity in their service to society. FAMU's distinction as a doctoral/research institution will continue to provide mechanisms to address emerging issues through local and global partnerships. Expanding upon the University's land-grant status, it will enhance the lives of constituents through innovative research, engaging cooperative extension, and public service. While the University continues its historic mission of educating African Americans, FAMU embraces persons of all races, ethnic origins and nationalities as life-long members of the university community.

VISION STATEMENT (What do you aspire to?)

Florida A&M University (FAMU) will be internationally recognized as a premier land grant and research institution committed to exemplary teaching, research, and service preparing transformational graduates with high ethical values dedicated to solving complex issues impacting our global society.

STATEMENT OF STRATEGY (How will you get there?)

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

The University's primary market continues to be African Americans and other underrepresented minorities. The University will continue to increase its efforts to attract students of all races, while enhancing its position as a leading producer of African American graduates, through innovative recruitment strategies, strategies to attract well-qualified students, as well as enhanced processes to increase yield rates, graduation rates and employment outcomes. This will necessitate a focus on quality of instruction in particular strategic areas. The University also seeks to enhance its standing as a doctoral research university through increased research activity by incentivizing faculty, particularly in STEM and health disciplines, with an expectation of increased external funding.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

Florida A&M University is a doctoral research institution and is one of the premier Historically Black Colleges and Universities (HBCUs) in the nation. Its strengths include over \$50 million in research expenditures annually, as well as offering an array of accredited professional programs and a focus on STEM and health disciplines, thereby producing minority graduates in these areas in which they are particularly underrepresented. In order to further enhance meeting its mission, the University intends to focus on increasing productivity in research as well as increase production and success rate of graduates at all degree levels in meeting the expectations of employers and the professions. Opportunities include the increased use of technology for effective recruitment and progression of students, including online courses and degree programs, and capitalizing on the restructured organization of the academic units to increase productivity in research as well as graduation rates of students.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1 Enhance visibility and productivity as a Doctoral/Research University

The University will implement strategies to increase engagement of faculty and students, particularly in STEM and health fields, in research and other creative activities and to pursue external funding. It is expected that the efforts of the University will increase the return on investment through external funding and patents resulting from research. Strategies will also focus on recruitment and progression of doctoral students and strengthening graduate programs in order to increase the production of graduates. Investments include rebates from indirect cost funds to principal investigators and start up costs for new faculty; filling three endowed chairs with exceptional researchers, increasing stipends to graduate assistants provided by the University to \$2.5 million annually; and hiring a Director for technology transfer.

2 Increase online courses and online academic degree programs

The University will undertake initiatives to significantly increase online courses and academic degree offerings. Strategies include incentivizing and supporting faculty in offering additional distance learning courses and programs, as well as partnering with experienced vendors for marketing and other support as the university builds on the efforts initiated in 2010 and 2011 to offer its first three online degree programs. The University has made significant investments - in technology and personnel. Additional investments in the next year will include three new faculty hires for the online Master of Public Health, and in the next three years, approximately \$3.5 million in technology, marketing and personnel.

3 Increase the persistence/retention rate of undergraduate students, leading to increased graduation rates

Strategies include: developing and implementing a comprehensive retention plan; increasing student participation in First Year Experience activities; increasing student engagement in curricular and co-curricular initiatives; offering professional development opportunities for students and faculty/advisors; and enhancing the electronic monitoring of student progression. The University has invested significantly in some of these activities designed to increase student retention and progression in the past two years, partly from tuition differential funds. Continued investments totaling almost \$4 million in the next three years are expected.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
FAMU increased its national rankings for production of African American graduates, by discipline, from eight in the top 10 in 2005-06 to fifteen in 2009-10. FAMU plans to build on this significant increase by continuing to increase the programs ranked in the top 10 to sixteen in 2012-2013. In three years, FAMU's goal is to increase its national rankings by disciplines to at least seventeen programs in the top 10 as published in <i>Diverse Issues in Higher Education Top 100 Minority Producers</i> .					
Avg. SAT Score	2.1%	1,428	1,427	1,428	1,430
Avg. High School GPA (on 4.0 scale)	4.0%	3.0	3.2	3.2	3.2
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	0	1	3	5
Exams Below National/State Benchmark	n/a	5	4	2	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	2		3	3	3
Operational Efficiency					
Freshman Retention Rate	-2.0%	79%	80%	81%	83%
FTIC Graduation Rates					
In 4 years (or less)	-0.8%	12%	12%	14%	15%
In 6 years (or less)	1%	39%	39.4%	41%	43%
AA Transfer Graduation Rates					
In 2 years (or less)	8.5%	25%	25%	26%	28%
In 4 years (or less)	-0.1%	65%	66%	67%	70%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	2		4	5	5
Return on Investment					
Bachelor's Degrees Awarded	0.5%	1,304	1,332	1,345	1,371
Percent of Bachelor's Degrees in STEM	-6.2%	16%	16%	16%	17%
Graduate Degrees Awarded	34.8%	632	648	654	667
Percent of Graduate Degrees in STEM	-1.6%	9%	9%	10%	12%
Percent of Baccalaureate Graduates Employed in Florida	2%	59% ³	59%	59%	69%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	5%	22% ³	22%	22%	25%
Annual Gifts Received (\$M)	-1.22%	\$ 4.28	\$ 5.5	\$ 5	\$ 5.5
Endowment (\$M)	9.7%	\$ 79.7	\$ 79.8	\$ 80	\$ 80.2
SUBTOTAL OF IMPROVING METRICS	5		4	5	8
TOTAL OF IMPROVING METRICS	9		11	13	16

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	n/a	2	1	2	3
National Academy Members	n/a	0	0	0	1
Number of Post-Doctoral Appointees	n/a	23	25	25	26
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	0	0	0	1
SUBTOTAL OF IMPROVING METRICS	n/a		1	1	4
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	1.55%	\$ 53	\$ 44	\$ 52	\$ 55
Science & Engineering Research Expenditures (\$M)	.96%	\$ 33	\$ 35	\$ 37	\$ 39
Percent of Research Expenditures funded from External Sources	.30%	87%	88%	90%	92%
Patents Issued	Incr 0 to 2	2	4	4	3
Licenses/Options Executed	-100%	0	0	2	0
Licensing Income Received (\$M)	-100%	\$ 0.00	\$ 0.00	\$ 50,000	\$ 50,000
Number of Start-up Companies	-100%	0	1	2	1
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	1.17%	28	30	32	34
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	237-186	237-186	230-186	225-186
Research Doctoral Degrees Awarded	37.5%	22	23	24	25
Professional Doctoral Degrees Awarded	49.3%	312	321	330	350
SUBTOTAL OF IMPROVING METRICS	7		7	10	7
TOTAL OF IMPROVING METRICS	7		8	11	11

Notes: (1) the most recent faculty Awards data is based on 2009-10 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
1. Bachelor's Degrees Awarded to Minorities	-1.5%	1,259	1,278	1,300	1,320
2. Percent of Course Sections Offered via Distance and Blended Learning	0%	0	0.78% (7 E&G + 40 Non E&G)	1.52% (42 E&G + 49 Non E&G)	2.15% (80 E&G + 50 Non E&G)
3. Percentage of Eligible Programs with Specialized Accreditation <small>** eligible programs calculated based on programs available at FAMU for which majority of other SUS institutions had accreditation</small>	Cannot compute meaningful comparison as several programs terminated in 2010-11	85.5%	85.5%	85.5%	92.7%



Institution Specific Goals (continued)

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

Goal 1. Increase the production of graduate degrees awarded to African Americans in the academic programs.

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric: Number of graduate degrees awarded to African Americans	17%	488	500	513	539

Goal 2. Establish the position as a top ten producer of African Americans with graduate and professional degrees in the sciences, technology, engineering and mathematics (STEM), law and health disciplines.

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric: Number of graduate degree programs in STEM, law and health, in which the University is in the top 10 in production of African American graduates. Source: IPEDS Data	46.67%	11	11	13	14



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 125.1	\$ 115.2	\$ 108.7	\$ 117.3	\$ 97.8	\$ 77.4
Tuition	\$ 46.9	\$ 50.9	\$ 57.3	\$ 69.7	\$ 64.1	n/a
TOTAL MAIN OPERATIONS	\$ 172.0	\$ 166.1	\$ 166.0	\$ 187.0	\$ 161.9	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL HSC	n/a	n/a	n/a	n/a	n/a	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL IFAS	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 172.0	\$ 166.1	\$ 166.0	\$ 187.0	\$ 161.9	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$ 26.6	\$ 25.2	\$ 22.8	\$ 25.3	\$ 24.9	n/a
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Contracts & Grants

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

Revenues	\$ 66.8	\$ 63.1	\$ 52.8	\$ 56.7	\$ 54.4	n/a
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Local Funds

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

Revenues	\$ 50.6	\$ 50.5	\$ 63.4	\$ 78.4	\$ 78.2	n/a
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Faculty Practice Plans

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

Revenues	\$ 144.0	\$ 138.8	\$ 139.0	\$ 160.4	\$ 157.5	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 316.0	\$ 304.9	\$ 305.0	\$ 347.4	\$ 319.4	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 316.0	\$ 304.9	\$ 305.0	\$ 347.4	\$ 319.4	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$384	\$642	\$1,204	\$1,849	\$2,592
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,371	\$1,434	\$1,523	\$1,523	\$1,523
TOTAL TUITION AND FEES	\$4,625	\$5,176	\$5,827	\$6,472	\$7,215

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	83%	81%	86%	84%	87%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$29,742	\$27,253	\$28,143	\$29,554	\$29,000
Student Loan Cohort Default Rate (2nd Year)	10.9%	12.8%	13.7%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	n/a	18.3%	n/a	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$4,548	\$1,138	\$8,754	\$1,088	\$2,052	\$17,580
AT HOME	\$4,548	\$1,138	\$1,884	\$1,532	\$2,418	\$11,520

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES		AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT	
	HEADCOUNT	PERCENT					
Below \$40,000	4,860	66%	\$11,002	-\$2,061	\$6,934	\$8,075	
\$40,000-\$59,999	983	13%	\$13,294	\$336	\$4,550	\$8,123	
\$60,000-\$79,999	499	7%	\$13,743	\$937	\$4,065	\$8,674	
\$80,000-\$99,999	367	5%	\$13,313	\$393	\$4,712	\$9,692	
\$100,000 Above	635	9%	\$13,099	\$235	\$4,958	\$9,404	
Missing	0	0%	0	0	0	0	
TOTAL	7,344	100%	AVERAGE	\$11,654	-\$1,365	\$6,272	\$8,286

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 7, 2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	\$4.6 million
Total differential fee revenue generated in 2012-13 (projected):	\$9,935,500
Intended Uses	
Need-based aid will be provided to qualifying students using 30% of the funds. Remaining funds (70%) will be used in activities to increase retention, hire adjuncts to offer additional course sections in high demand general education courses, and to hire regular faculty in STEM and other critical areas at the undergraduate level.	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
There will be a significant negative impact on availability of required general education course sections, students' ability to obtain required courses, resulting in inability to continue education, larger class sizes, decreased graduation rates, increased time to degree and excess hours from taking unnecessary courses if required courses are not available.	
Request to Modify or Waive Tuition Differential Uses	
(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
\$525,000 Retention	Using the tuition differential funds for retention activities, the following activities were accomplished in 2011-12: Enrollment Coaches were hired; Career Development software for a Self-Directed Search test and Retention Software were purchased; a Coordinator Academic Programs was hired; materials and supplies were obtained for the instructors, mentors and students (including Freshmen Support Services Folders, Peer Mentor Journals, and Instructor Portfolio); co-sponsored the Summer Reading Program to promote critical thinking; facilitated the freshmen Critical Thinking Seminars and conducted Faculty and Staff Webinars to promote teaching critical thinking skills.
The University will use differential tuition revenue to support instructors needed to teach additional courses in essential and sequenced General Education courses, as well as offer summer courses with significant student demand. The University anticipates continued enrollment growth over the next few years and we will continue to monitor hires in the critical need areas.	During the 2011-12 academic year, the University offered 859 additional course sections to meet the demands in critical need areas utilizing the tuition differential funds.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	521 adjunct instructors (30.76 FTE) were hired during the 2011-2012 academic year.
Total Number of Advisors Hired or Retained (funded by tuition differential):	4.5
Total Number of Course Sections Added or Saved (funded by tuition differential):	859 classes were made available to students during the 2011-2012 academic year.
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase the persistence/retention rate of undergraduate students, leading to increased graduation rates.	Time-to-Major Declaration: 95% of Freshmen students entering Fall 2011 had declared a major by end of the Spring 2012. Activities included: <ul style="list-style-type: none"> • Change-of-Major Fair • Intrusive Academic Advising • Enrollment Coaches • Career Development (Self-Directed Search test)



	<p>Academic Advisor Training: 100% of Academic Advisors attend University-wide training.</p> <p>First Year Experience Course:</p> <ul style="list-style-type: none"> Offered 22 sections of the First Year Experience course in Fall 2011 and five (5) sections in Spring 2012 Obtained the necessary materials and supplies for the instructors, mentors and students to support The First Year Experience Course. (Freshmen Support Services Folders, Peer Mentor Journals, and Instructor Portfolio). Funded Freshmen Summer Reading Program to promote the development of critical thinking skills through written and oral communication of incoming freshmen. Sponsored Critical Thinking Seminars to highlight successful critical thinking strategies and stimulate students' critical thinking skills. Sponsored Faculty and Staff Webinars have been offered to assist faculty and staff with acquiring on-site professional development training that is geared toward increasing services to students designed to increase the University's retention, progression, and graduation rates. Peer mentoring program, a component of the First Year Experience course, was implemented to aid first-time-in-college students with their academic and social transition from high-school to college.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	783
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$2,250
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$500
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$4,000



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES, & AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

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

	Estimated Actual*		Estimated
	2011-12		2012-13
	-----		-----
<u>FTE Positions:</u>			
Faculty	30.76		45.76
Advisors	4.5		5.50
Staff	0		2.0
Total FTE Positions:	35.26		53.26
<u>Balance Forward from Prior Periods</u>			
Balance Forward	\$ 1,332,000	\$	967,309
Less: Prior-Year Encumbrances	77,332		-
Beginning Balance Available:	\$ 1,254,668	\$	967,309
<u>Receipts / Revenues</u>			
Tuition Differential Collections	\$ 5,329,465	\$	9,935,549
Interest Revenue - Current Year	-		-
Interest Revenue - From Carryforward Balance	-		-
Total Receipts / Revenues:	\$ 5,329,465	\$	9,935,549
<u>Expenditures</u>			
Salaries & Benefits	\$ 601,260	\$	2,601,260 ***
Other Personal Services	2,898,740		3,716,936
Expenses	-		-
Operating Capital Outlay	-		-
Student Financial Assistance	1,033,362	*****	2,980,664
Expended From Carryforward Balance	1,083,462		1,000,000 ****
**Other Category Expenditures	-		
Total Expenditures:	\$ 5,616,824	\$	10,298,860
Ending Balance Available:	\$ 967,309	\$	603,998

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.

***2 million in new hires (faculty and advisors).

****Funds set aside for the 2013 summer school.

*****Plans are to award an additional \$659,159 by the end of May.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	5.74	\$12.80	\$21.42	\$40.13	\$61.64	\$86.38	\$114.83
Total Base Tuition & Differential per Credit Hour	\$94.33	\$108.47	\$124.74	\$143.45	\$164.96	\$189.70	\$218.15
% Change	-	15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76
Activity & Service	\$10.50	\$10.50	\$10.50	\$10.50	\$10.50	\$10.50	\$10.50
Health	-	-	-	\$6.91	\$6.91	\$6.91	\$6.91
Athletic	\$11.30	\$12.62	\$13.97	\$13.97	\$13.97	\$13.97	\$13.97
Transportation Access	-	-	-	-	-	-	-
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)	-	-	-	-	-	-	-
Student Life & Services Fee (UNF only)	-	-	-	-	-	-	-
Marshall Center Fee (USF only)	-	-	-	-	-	-	-
Student Affairs Facility Use Fee (FSU only)	-	-	-	-	-	-	-
Total Fees	\$35.40	\$37.44	\$39.55	\$46.46	\$46.46	\$46.46	\$46.46
Total Tuition and Fees per Credit Hour	\$129.73	\$145.91	\$164.29	\$189.91	\$211.42	\$236.16	\$264.61
% Change	-	12.5%	12.6%	15.6%	11.3%	11.7%	12.0%
Fees (block per term):							
Activity & Service	-	-	-	-	-	-	-
Health	\$59.00	\$59.00	\$59.00	-	-	-	-
Athletic	-	-	-	-	-	-	-
Transportation Access	\$55.00	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00	\$65.00
Marshall Center Fee (USF only)	-	-	-	-	-	-	-
Student Affairs Facility Use Fee (FSU only)	-	-	-	-	-	-	-
Total Block Fees per term	\$114.00	\$124.00	\$124.00	\$65.00	\$65.00	\$65.00	\$65.00
% Change	\$0.00	8.8%	0.0%	-47.6%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,948.80	\$5,691.00	\$6,544.50
Total Fees for 30 Credit Hours	\$1,290.00	\$1,371.20	\$1,434.50	\$1,523.80	\$1,523.80	\$1,523.80	\$1,523.80
Total Tuition and Fees for 30 Credit Hours	\$4,119.90	\$4,625.30	\$5,176.70	\$5,827.30	\$6,472.60	\$7,214.80	\$8,068.30
\$ Change	-	\$505.40	\$551.40	\$650.60	\$645.30	\$742.20	\$853.50
% Change	-	12.3%	11.9%	12.6%	11.1%	11.5%	11.8%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$379.07	\$379.07	\$379.07	\$409.40	\$409.40	\$409.40	\$409.40
Out-of-State Undergraduate Student Financial Aid ³	\$18.95	\$18.95	\$18.95	\$20.47	\$20.47	\$20.47	\$20.47
Total per credit hour	\$398.02	\$398.02	\$398.02	\$429.87	\$429.87	\$429.87	\$429.87
% Change	-	0.0%	0.0%	8.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,948.80	\$5,691.00	\$6,544.50
Total Fees for 30 Credit Hours	\$13,230.60	\$13,311.80	\$13,375.10	\$14,419.90	\$14,419.90	\$14,419.90	\$14,419.90
Total Tuition and Fees for 30 Credit Hours	\$16,060.50	\$16,565.90	\$17,117.30	\$18,723.40	\$19,368.70	\$20,110.90	\$20,964.40
\$ Change	-	\$505.40	\$551.40	\$1,606.10	\$645.30	\$742.20	\$853.50
% Change	-	3.1%	3.3%	9.4%	3.4%	3.8%	4.2%
Housing/Dining⁴	\$7,396.00	\$7,907.00	\$8,826.20	\$9,299.62	\$9,804.06	\$10,341.59	\$10,910.38
\$ Change	-	\$511.00	\$919.20	\$473.42	\$504.44	\$537.53	\$568.79
% Change	-	6.9%	11.6%	5.4%	5.4%	5.5%	5.5%

¹ can be no more than 5% of tuition.³ can be no more than 5% of tuition and the out-of-state fee.² capped in statute.⁴ combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	-50%	3,287	31%	3,161	29%	3,316	31%	3,471	32%
FTIC (Profile Admit)**	204%	5,714	51%	5,657	53%	5,600	51%	5,544	50%
AA Transfers*	76%	1,180	12%	1,255	12%	1,268	12%	1,283	12%
Other Transfers	-8%	841	6%	688	6%	696	6%	703	6%
Subtotal	9%	11,022	100%	10,761	100%	10,880	100%	11,001	100%
GRADUATE STUDENTS									
Master's	9%	823	41%	846	42%	855	42%	865	42%
Research Doctoral	14%	158	8%	153	8%	155	8%	157	8%
Professional Doctoral	56%	1,028	51%	993	50%	1,004	50%	1,015	50%
Subtotal	29%	2,009	100%	1,992	100%	2,014	100%	2,037	100%
NOT-DEGREE SEEKING	-58%	176		178		180		182	
MEDICAL	n/a	n/a		n/a		n/a		n/a	
TOTAL	9%	13,207		12,931		13,074		13,220	

Note*: AA transfers refer only to transfers from the Florida College System.**FAMU plans to continue to reduce the number of FTIC profile students admits annually, however, plans are to retain the currently enrolled students who were admitted as profile admits.

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	0%	0	0%	36	0.5%	51	0.7%	65	0.9%
HYBRID (50%-79%)	0%	0	0%	0	00%	60	0.8%	90	1.2%
TRADITIONAL (<50%)	4%	7,585	100%	7,102	99.5%	7,105	98.5%	7,139	97.9%
TOTAL	4%	7,585	100%	7,138	100%	7,216	100%	7,294	100%
GRADUATE									
DISTANCE (80%)	0%	0	0%	0	0%	29	1.7%	29	1.7%
HYBRID (50%-79%)	0%	0	0%	0	0%	0	0%	0	0%
TRADITIONAL (<50%)	32%	1,507	100%	1,629	100%	1,620	98.3%	1,640	98.3%
TOTAL	32%	1,507	100%	1,629	100%	1,649	100%	1,669	100%

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



ENROLLMENT PLANNING(continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	3,601	3,863	3,601	3,601	3,637	3,673	3,747	1.0%
UPPER DIVISION	2,868	2,765	2,868	2,796	2,838	2,881	2,968	1.5%
GRAD I	475	462	475	463	470	477	492	1.5%
GRAD II	803	835	803	843	856	869	895	1.5%
TOTAL	7,747	7,925	7,747	7,704	7,801	7,900	8,102	1.4%
Not a Florida Resident								
LOWER DIVISION	462	344	462	439	439	439	439	0%
UPPER DIVISION	317	236	317	301	301	301	301	0%
GRAD I	148	110	148	140	140	140	140	0%
GRAD II	192	143	192	183	183	183	183	0%
TOTAL	1,119	833	1,119	1,063	1,063	1,063	1,063	0%
TOTAL								
LOWER DIVISION	3,601	4,207	4,063	4,040	4,076	4,112	4,186	0.1%
UPPER DIVISION	2,868	3,001	3,185	3,098	3,139	3,182	3,269	1.4%
GRAD I	475	572	623	604	610	618	632	1.2%
GRAD II	803	978	995	1,026	1,038	1,051	1,07	1.2%
TOTAL	8,866	8,758	8,866	8,767	8,864	8,963	9,165	1.2%
TOTAL (US FTE)	11,821	11,677	11,821	11,689	11,818	11,950	12,220	1.20%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
Dentistry Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
Veterinary Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Pharmaceutical Sciences	51.2099	STEM	None	None	140	06-2012
Environmental Studies	03.0103	STEM	FGCU, FIU	None		04-2013

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

Curriculum and Instruction	13.0301	NO	FAU, FGCU, FIU, UCF, UF, USF, UWF	FGCU, UWF, USF, UF	80	04-2013
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DOCTORAL PROGRAMS

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Food Sciences	01.1001	NO	UF	None	70	06-2013
Digital Media	09.0702 or 50.0102	STEM	FAU, FGCU, UCF, UF	None	100	09-2014
Health and Fitness	31.0501 or 31.0504	NO	UWF, FSU, UF, UNF	UF	60	06-2013
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Biomedical Sciences	26.0102	STEM	FSU, FAU	None	30	08-2013
Health Informatics	51.0706	HEALTH	UCF	None	30	06-2013
Golf Management	31.0302	NO	Tracks at UF, FGCU	None	40	06-2014
DOCTORAL PROGRAMS						
Chemistry	40.0501	STEM	FAU, FIU, FSU, UCF, UF, USF	None	20	04-2014
Doctor of Nursing Practice	51.3818	HEALTH	FAU, FIU, FSU UCF, UF, UNF, USF	UCF, FIU, FAU	50	06-2013
Public Health (PhD)	51.2201	HEALTH	FIU, UF, USF	None	25	04-2015
Dentistry	51.0401	HEALTH	UF	None	280	TBD



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers(PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Post doctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

FAU

2012-13 Work Plan



Florida Atlantic University

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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- b. Vision Statement
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2. KEY PERFORMANCE INDICATORS

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- c. Institution Specific Goals

3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

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

VISION STATEMENT (What do you aspire to?)

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

STATEMENT OF STRATEGY (How will you get there?)

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

Statement of Strategy

Florida Atlantic University's 2012-17 Strategic Plan, titled "Making Waves: Celebrating and Cultivating Discovery, Diversity, and Distinction," provides strategies for addressing and leading our market (<http://www.fau.edu/planning/files/2012-2017-Strategic-Plan-Approved-by-FAU-BOT.pdf>). Summarized below are the goals and strategies included in the plan.

Goal I: Enrich the educational experience

Strategies included under this goal are expanding the breadth and scope of FAU's honors programs and STEM initiatives. FAU will increase the number of students, programs, scholarships and degree awards in both of these areas.

**Goal II: Inspire research, scholarship and creative activity**

FAU plans to double funded research in 5 years by hiring additional faculty and leading scholars and by facilitating current faculty interactions with relevant funding agencies. Also included under this goal is a plan for a new SACS Quality Enhancement Plan (QEP) focused on weaving research experiences throughout the undergraduate curriculum.

Goal III: Increase FAU's community engagement

One strategy for making this goal a reality is to foster private-public partnerships and maximize the value of the University's expertise in its region. Examples include increasing the following: number of interns placed in the Research Park, corporate sponsorship of FAU events, industry funded research, community engagement through advisory boards, and opportunities for experiential learning for FAU students and service for faculty.

Goal IV: Leverage momentum toward achieving FAU's strategic goals by being good stewards of its human, technological, physical and financial resources

FAU is committed to implementing strategic choices that result in growth and enhanced stature. For this to occur it is essential that the institution ensure the viability of its financial resources and enhance its efficiency and effectiveness. Examples of strategies include developing funding policies, trend analysis, and guidelines for best practices in various administrative areas. Other strategies include implementing administrative program review, building state-of-the-art IT infrastructure, enhancing master planning, and making effective use of existing facilities.

FAU's Signature Themes

In setting the goal of attaining very high standards in research, the University is striving to enhance its role as an intellectual leader and take its ability to serve as a creative force to new heights by naming the following as three signature themes for the institution:

- Marine and Coastal Issues
- Biotechnology
- Contemporary Societal Challenges



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities and opportunities (aka "weaknesses") for improvement?

FAU prides itself in having a new Medical College and will continue to invest and consolidate the standing of this program so it matures into one that is noted for its excellence in teaching, research and patient care. The presence of a strong Medical College on campus will position the entire University to work with greater synergy in pursuing interdisciplinary research in healthcare areas. The potential of NSF/NIH and other funding will tie together teaching, research, policy and practice for numerous FAU's departments, thus creating opportunities for signature programming.

One of FAU's strengths lies in its strong partnerships with preeminent organizations, including Scripps Florida and Max Plank Florida Institute, which are both housed on FAU's Jupiter campus, Torrey Pines Institute for Molecular Studies, and Vaccine Gene Therapy Institute (VGTI). While FAU's plans to build a noteworthy and differentiated mission for each of its branch campuses, the Jupiter campus is currently designated as a destination for science, research and graduate education.

Distance education is also identified as an area of FAU strength as it will bring significant transformation and growth in the delivery of the institution's programs. The University expects to make sizeable investments in this area and hopes to capitalize on the availability of new and existing technologies to expand distance offerings.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. FAU's updated 2012-17 Strategic Plan provides a roadmap for achieving the goal of attaining the Carnegie designation of a very high research institution. Identifying three signature themes in the area of Marine and Coastal Issues, Biotechnology, and Contemporary Societal Challenges is one strategy that will move the institution in the desired direction. These themes allow the University to pursue selective initiatives, within a broad range of academic and research offerings, to advance targeted areas of distinction and strength. This will result in the University developing its niche and thus attaining preeminence in notable areas.

At this time FAU envisions faculty hiring in disciplinary fields involving signature themes. Increased graduate and teaching assistantships are to be allocated to promote the goals of this program. Increased support will be made available for undergraduate research and attempts will be made to enhance the curriculum to reflect FAU's specialized strength. Community partnerships in these areas will be enhanced due to the visibility of support for new academic programs. Finally, the institution will enhance support for interdisciplinary grant activity with the goal of pursuing higher targets in research funding under these themes.



2. FAU plans to incorporate undergraduate research as an integral part of the curriculum through implementation of the SACS Quality Enhancement Plan (QEP). The focus of the QEP is improving student learning through integrating and expanding a culture of research and inquiry on campus. The QEP will provide a significant increase in the following: (1) student opportunities to actively participate in undergraduate research and inquiry; (2) fundamental skills necessary for students to engage in this important activity; and (3) retention and recruitment of high-ability students.
3. The University has adopted stronger and more effective strategies aimed at partnering with various public, private and civic organizations that will result in economic development in the region. For example, FAU's signature themes strive to address an often unmet public need for understanding academic research and its relevance to local challenges and opportunities. The signature themes will provide an umbrella for grouping together the work of several academic disciplines to address current and emerging real-life challenges. At the intersection of teaching, research and service, is an opportunity for FAU faculty and staff to extend their role as practitioners and collaborators in a very broad sense. The University is committed to achieving this through a variety of strategies, one of which is the implementation of strategic themes that create a platform for new avenues for economic development in the region.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
FAU plans to increase national preeminence by hiring senior faculty in marine and coastal studies, neurosciences, ocean and mechanical engineering, and nursing.					
Avg. SAT Score	4%	1600	1600	1635	1675
Avg. High School GPA (on 4.0 scale)	3%	3.3	3.4	3.5	3.6
Professional/Licensure Exam First-time Pass Rates					
Exams Above National/State Benchmark	n/a	0	1	1	2
Exams Below National/State Benchmark	n/a	1	0	0	0
<i>(Note: Med School grads will take exam in 2014-15)</i>					
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	2	3	3	4	
Operational Efficiency					
Freshman Retention Rate	6%	79%	81%	83%	85%
FTIC Graduation Rates					
In 4 years (or less)	1%	15%	17%	19%	21%
In 6 years (or less)	5%	41%	43%	45%	47%
AA Transfer Graduation Rates					
In 2 years (or less)	-3%	22%	24%	26%	28%
In 4 years (or less)	3%	63%	65%	67%	69%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	4	5	5	5	
Return on Investment					
Bachelor's Degrees Awarded	6%	4,593	5,025	5,125	5,228
Percent of Bachelor's Degrees in STEM	17%	19%	22%	24%	26%
Master's Degrees Awarded	23%	1,348	1,304	1,330	1,357
Percent of Master's Degrees in STEM	21%	14%	16%	18%	20%
Percent of Baccalaureate Graduates Employed in Florida	70%	70%	72%	74%	76%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	18%	17%	19%	21%	23%
Annual Gifts Received (\$M)	53%	\$8.12	\$9.2	\$9.6	\$10.3
Endowment (\$M)	6.7%	\$179.9	\$175.9	\$187.6	\$200.3
SUBTOTAL OF IMPROVING METRICS	8	6	8	8	
TOTAL OF IMPROVING METRICS	14	14	16	17	

Note: Performance metrics are defined on pages 18-21.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND <i>(06-07 to 10-11)</i>	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS <i>(2014-15)</i>
Academic Quality					
Faculty Awards	67%	3 ¹	3	4	5
National Academy Members	0%	1	1	1	2
Number of Post-Doctoral Appointees	8%	9	10	12	14
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures <i>(based on 8 broad discipline areas, and includes private universities)</i>	n/a	2	2	2	3
SUBTOTAL OF IMPROVING METRICS	2		1	2	4
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) <i>(includes non-Science & Engineering disciplines)</i>	-21%	\$ 43.0	\$ 46	\$ 57.0	\$ 66.0
Science & Engineering Research Expenditures (\$M)	-20%	\$ 26.1	\$ 25.2	\$ 32.2	\$ 38.2
Percent of Research Expenditures funded from External Sources	1%	86%	86%	87%	89%
Patents Issued	50%	3	4	4	5
Licenses/Options Executed	50%	6	4	5	6
Licensing Income Received (\$M)	121%	\$ 145,476	\$ 151,887	\$ 175,910	\$ 200,000
Number of Start-up Companies	100%	2	2	2	2
Science & Engineering R&D Expenditures in non-Medical/Health Sciences	-29%	\$18.1	\$17.5	\$17.9	19.2
National Rank is Higher than Predicted by the Financial Resources Ranking <i>(based on U.S. News & World Report)</i>	n/a	NR-FR	n/a	n/a	n/a
Research Doctoral Degrees Awarded	19%	74	97	108	120
Percent of Research Doctoral Degrees Awarded in STEM	4%	64%	66%	68%	70%
Professional Doctoral Degrees Awarded	n/a	14	20	22	88
SUBTOTAL OF IMPROVING METRICS	7		6	9	10
TOTAL OF IMPROVING METRICS	9		7	11	14



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Bachelors Degrees Awarded to Minorities	16%	2,001	2,101	2,311	2,311
Percent of Course Sections Offered via Distance and Blended Learning	11.7%	21.8%	22.9%	23.5%	27.6%
Percentage of Students Participating in Identified Community and Business Engagement Activities	N/A	16%	12.7%	14%	15.7%

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

1) This year Florida Atlantic University opened the newest medical school in America. The growth of the College of Medicine is a major University priority. The most critical objective is provisional accreditation by the LCME. Another objective is to increase the number of students supported by scholarships through philanthropy. A third goal is to develop four new residency programs over the next three to five years through the Graduate Medical Education Consortium of five local hospitals. The Medical School plans to hire eight faculty this year for both education and the research. Lastly, the College aims to establish a clinical practice in conjunction with local area hospitals and is planning to have at least five faculty providing clinical care by the end of the 2012-2013 academic year.

Metric	5 YEAR TREND	2010-11 Actual	2011-12 Estimates	2012-13 Goals	3 YEAR GOALS
Faculty working in community clinics	n/a	0	0	5	10



2) Florida Atlantic University's Harbor Branch Oceanographic Institute recently completed a new strategic plan that identified research and education initiatives for the next five years. Goals associated with these initiatives include: a) sponsorship of both national and regional workshops on estuarine observing systems in support of the Indian River Lagoon Observatory; b) hiring three faculty that can contribute to the research initiatives; c) enhancing educational programs at HBOI by developing advanced degrees in marine science in collaboration with the Charles E Schmidt College of Science and by completing an analysis of the potential to expand undergraduate programs; d) beginning a fundraising program for our research initiatives in collaboration with the Harbor Branch Oceanographic Institute Foundation with a goal of raising \$800,000 during the next year, three times the previous annual fundraising success.

Metric	5 YEAR TREND	2010-11 Actual	2011-12 Estimates	2012-13 Goals	3 YEAR GOALS
Faculty	0%	0	0	3	6
Non-FAU students in Semester-by-the-Sea	0%	0	0	2	7



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 188.5	\$ 180.7	\$165.4	\$169.3	\$144.8	\$ 105.4
Tuition	\$ 67.9	\$70.8	\$ 79.6	\$91.2	\$96.8	n/a
TOTAL MAIN OPERATIONS	\$ 256.5	\$ 251.6	\$ 245.0	\$ 260.6	\$ 241.7	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	n/a	n/a	n/a	n/a	n/a	\$12.8
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL HSC	n/a	n/a	n/a	n/a	n/a	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL IFAS	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 256.5	\$251.6	\$ 245.0	\$ 260.6	\$ 241.7	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident students (as reported in the Annual Accountability Report). Note*: 2012-13 Appropriated tuition is based on the appropriated budget authority.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$82.9	\$ 91.3	\$ 81.7	\$ 80.4	\$ 88.7	n/a
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Contracts & Grants

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

Revenues	\$38.4	\$ 54.8	\$ 48.8	\$ 47.9	\$ 48.9	n/a
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Local Funds

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

Revenues	\$ 120.5	\$ 141.3	\$165.9	\$ 194.3	\$195.9	n/a
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Faculty Practice Plans

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

Revenues	n/a	n/a	n/a	n/a	n/a	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 241.8	\$ 287.4	\$ 296.4	\$ 322.7	\$ 333.6	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 498.4	\$ 539.1	\$ 541.5	\$ 583.5	\$ 575.3	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870.10	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
Tuition Differential Fee	\$384.00	\$642.62	\$1,203.95	\$1,849.48	\$2,591.84
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,670.00	\$1,741.46	\$1,769.36	\$1,798.09	\$1,827.69
TOTAL TUITION AND FEES	\$4,924.10	\$5,483.68	\$6,072.90	\$6,747.17	\$7,519.13

Note 1: For more information regarding required fees see list of per credit hour fees and block fees on page 19.

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	46%	48%	47%	49%	53%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$17,252	\$18,174	\$19,022	\$18,136	\$20,670
Student Loan Cohort Default Rate (2nd Year)	3.9%	4.8%	5.4%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	6.9%	7.6%	n/a	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,372	\$939	\$10,940	\$1,993	\$1,678	\$20,922
AT HOME	\$5,372	\$939	\$1,356	\$2,868	\$1,678	\$12,213

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT	
Below \$40,000	3,987	40%	\$13,955	\$(4,481)	\$7,624	\$3,740	
\$40,000-\$59,999	1,152	12%	\$15,393	\$(1,664)	\$4,821	\$3,523	
\$60,000-\$79,999	838	08%	\$15,867	\$155	\$3,018	\$3,646	
\$80,000-\$99,999	681	07%	\$16,070	\$491	\$2,671	\$3,665	
\$100,000 Above	1,927	20%	\$15,987	\$553	\$2,652	\$2,666	
Missing	1,292	13%	N/A	\$2,264	\$692	\$122	
TOTAL	9,877	100%	AVERAGE	\$14,941	\$(1,552)	\$4,688	\$3,019

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. Family Income Groups are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. Full-time Students is a headcount based on at least 24 credit hours during Fall and Spring terms. Average Gift Aid includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. Net Cost of Attendance is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. Net Tuition & Fees is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). Average Loan Amount includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line Average represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 21, 2012
Implementation Date (month/year):	Fall, 2012 semester
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University – all locations, where applicable
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42 (2011-12) \$40.13 (2012-13)
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$13,169,253
Total differential fee revenue generated in 2012-13 (projected):	\$22,597,935
Intended Uses	
<p>Describe how the revenue will be used.</p> <p>To support undergraduate instruction; specifically, faculty salaries, advising salaries, etc. Given recent years reduction in general revenue by the State of Florida, tuition differential will replace prior allocations that have been cut so that FAU will be able to maintain our current enrollment objectives.</p>	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>Without these funds, our budget will undergo yet another severe reduction to our base operations. A reduction of \$13M represents an additional 5.5% base cut over the \$24Million already cut to our 2012-13 budget. Over 75 faculty, 9 advisors and 500 course sections would face elimination.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
To ensure access, degree completion, meet student demand, continue FTE goals, and augment advising	FTE production increased by 4.7% despite budget cutbacks by the State of Florida
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	75
Total Number of Advisors Hired or Retained (funded by tuition differential):	9
Total Number of Course Sections Added or Saved (funded by tuition differential):	500
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
To augment existing need based funds.	\$2,855,747 is estimated to be added to the Financial Aid need-based pool of funds for students
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	3,383
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,649
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$64
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$2,000



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	75.00	189.00
Advisors	9.00	9.00
Staff	0.00	0.00
Total FTE Positions:	84.00	198.00
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$9,230,909	\$ 22,597,935
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 9,230,909	\$ 22,597,935
<u>Expenditures</u>		
Salaries & Benefits	6,461,636	15,818,555
Other Personal Services	-	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	\$ 2,769,273	\$ 6,779,381
Expended From Carryforward Balance		
**Other Category Expenditures		
Total Expenditures:	\$ 9,230,909	\$ 22,597,935
Ending Balance Available:	\$ 0.00	\$ 0.00
*Since the 2011-12 year has not been completed, provide an estimated actual.		
**Provide details for "Other Categories" used.		



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University: Florida Atlantic University							
<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	\$5.74	\$12.80	\$21.42	\$40.13	\$61.65	\$86.39	\$114.85
Total Base Tuition & Differential per Credit Hour	\$94.33	\$108.47	\$124.74	\$143.45	\$164.97	\$189.71	\$218.17
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76
Activity & Service	\$10.40	\$11.96	\$11.96	\$12.28	\$12.65	\$13.03	\$13.03
Health	\$7.80	\$8.97	\$9.42	\$9.70	\$9.99	\$10.19	\$10.19
Athletic	\$14.30	\$16.45	\$16.45	\$17.27	\$17.79	\$17.97	\$17.97
Transportation Access	\$0.00						
Technology ¹	\$3.54	\$4.42	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$45.22	\$51.34	\$52.91	\$54.33	\$55.51	\$56.27	\$56.27
Total Tuition and Fees per Credit Hour	\$139.55	\$159.81	\$177.65	\$197.78	\$220.48	\$245.98	\$274.44
% Change		14.5%	11.2%	11.3%	11.5%	11.6%	11.6%
Fees (block per term):							
Activity & Service							
Health							
Athletic							
Transportation Access	\$62.50	\$64.90	\$64.90	\$76.90	\$79.21	\$81.58	\$84.03
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$62.50	\$64.90	\$64.90	\$76.90	\$79.21	\$81.58	\$84.03
% Change		3.8%	0.0%	18.5%	3.0%	3.0%	3.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,949.10	\$5,691.30	\$6,545.10
Total Fees for 30 Credit Hours	\$1,481.60	\$1,670.00	\$1,717.10	\$1,783.70	\$1,823.71	\$1,851.27	\$1,856.16
Total Tuition and Fees for 30 Credit Hours	\$4,311.50	\$4,924.10	\$5,459.30	\$6,087.20	\$6,772.81	\$7,542.57	\$8,401.26
\$ Change		\$612.60	\$535.20	\$627.90	\$685.61	\$769.75	\$858.69
% Change		14.2%	10.9%	11.5%	11.3%	11.4%	11.4%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$423.41	\$423.41	\$457.28	\$471.00	\$471.00	\$471.00	\$471.00
Out-of-State Undergraduate Student Financial Aid ³	\$25.87	\$25.95	\$27.40	\$28.70	\$28.70	\$28.70	\$28.70
Total per credit hour	\$449.28	\$449.36	\$484.68	\$499.70	\$499.70	\$499.70	\$499.70
% Change		0.0%	7.9%	3.1%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$16,308.30	\$16,734.90	\$18,282.60	\$19,294.50	\$19,940.10	\$20,682.30	\$21,536.10
Total Fees for 30 Credit Hours	\$2,257.70	\$2,448.50	\$2,539.10	\$2,644.70	\$2,684.71	\$2,712.27	\$2,717.16
Total Tuition and Fees for 30 Credit Hours	\$18,566.00	\$19,183.40	\$20,821.70	\$21,939.20	\$22,624.81	\$23,394.57	\$24,253.26
\$ Change		\$426.60	\$1,547.70	\$1,011.90	\$645.60	\$742.20	\$853.80
% Change		2.6%	9.2%	5.5%	3.3%	3.7%	4.1%
Housing/Dining⁴	\$8,728.00	\$8,894.00	\$9,071.88	\$9,344.04	\$9,624.36	\$9,913.09	\$10,210.48
\$ Change	\$0.00	\$166.00	\$177.88	\$272.16	\$280.32	\$288.73	\$297.39
% Change		1.9%	2.0%	3.0%	3.0%	3.0%	3.0%

¹ can be no more than 5% of tuition.³ can be no more than 5% of tuition and the out-of-state fee.² capped in statute.⁴ combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND (2006-07 to 2010-11)	2010-11 ACTUAL HEADCOUNT	2012-13 PLANNED HEADCOUNT	2013-14 PLANNED HEADCOUNT	3 YEAR (2014-15) PLANNED HEADCOUNT
UNDERGRADUATE					
FTIC (Regular Admit)	3%	2,772	3,080	3,500	3,650
FTIC (Profile Admit)	40%	28	45	45	48
AA Transfers	3%	2,414	2,800	2,864	2,900
Other Transfers	(22%)	1,034	980	1,001	1,050
Subtotal	0%	6,248	6,905	7,410	7,648
GRADUATE STUDENTS					
Master's	78%	4,292	4,421	4,553	4,690
Research Doctoral	15%	878	904	931	959
Professional Doctoral	7%	52	54	55	57
Subtotal	100%	5,222	5,379	5,539	5,706
NOT-DEGREE SEEKING	(23%)	1,730	2,128	2,617	3,219
MEDICAL	n/a	0	128	192	256
TOTAL		13,200	14,540	15,758	16,829

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

	3 YEAR TREND (2008-09 to 2010-11)	2010-11 ACTUAL FTE	2012-13 PLANNED FTE	2013-14 PLANNED FTE	3 YEAR (2014-15) PLANNED FTE
UNDERGRADUATE					
DISTANCE (>80%)	19%	839	990	1169	1379
HYBRID (50%-79%)	12%	70	84	94	106
TRADITIONAL (<50%)	4%	13593	14137	14703	15291
TOTAL			15212	15966	16775
GRADUATE					
DISTANCE (80%)	2%	443	456	479	503
HYBRID (50%-79%)	14%	39	45	51	58
TRADITIONAL (<50%)	6%	1820	1911	2007	2107
TOTAL		2302	2412	2537	2668

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	4,461	6,030	4461	6,449	6,897	7,376	8,437	8%
UPPER DIVISION	7,910	8,363	7910	8,882	9,433	10,018	11,299	7%
GRAD I	1,764	1,663	1764	1,710	1,758	1,807	1,910	3%
GRAD II	194	284	194	302	321	341	384	7%
TOTAL	14,329	16,339	14,329	17,343	18,409	19,543	22,030	7%
Not a Florida Resident								
LOWER DIVISION	n/a	351	n/a	375	401	429	491	8%
UPPER DIVISION	n/a	357	n/a	379	402	427	481	7%
GRAD I	n/a	175	n/a	180	185	190	200	3%
GRAD II	n/a	104	n/a	110	117	124	140	7%
TOTAL	910	986	910	1,044	1,105	1,170	1,312	7%
TOTAL								
LOWER DIVISION	n/a	6,380	n/a	6,824	7,298	7,805	8,927	8%
UPPER DIVISION	n/a	8,720	n/a	9,261	9,835	10,445	11,781	7%
GRAD I	n/a	1,837	n/a	1,889	1,942	1,996	2,109	3%
GRAD II	n/a	388	n/a	412	438	465	525	7%
TOTAL	15,239	17,325	15,239	18,386	19,513	20,711	22,342	7%
TOTAL (US FTE)	n/a	23,100	n/a	24,516	26,019	27,616	31,123	7%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	51	51	103	103	154	206	206	61%
NON-RESIDENT	13	13	25	25	38	50	50	57%
TOTAL	64	64	128	128	192	256	256	60%
Dentistry Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Veterinary Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
BA Environmental Education	03.0103	STEM	FIU		25	May 2013
BS Environmental Engineering	14.1401		FIU,UCF,UF		250	May 2014
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
M Instructional Technology	13.0501	STEM	FSU,UCF,UWF	UWF	59	May 2013
M Secondary Education	13.1205	EDUC	FGCU,FSU,UNF		40	May 2013
M Educational Psychology	42.1801		FSU		30	May 2013
PSM Marine Science	26.1302	STEM			30	May 2013
MS Global Health/Bioethics	51.2210	HEALTH			24/30	May 2013
DOCTORAL PROGRAMS						
DSW Social Work	44.0701	HEALTH			70	May 2013
PhD Civil Engineering	14.0801	STEM	FAMU, FIU, FSU, UCF, UF, USF		20	May 2014



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
a. National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
b. Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
c. Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
d. Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
e. Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
f. Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the second year.
g. FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
h. AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
i. Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment

j. Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
k. Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
l. Master's Degrees Awarded	This is a count of graduate degrees granted.
m. Percent of Master's Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
n. Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
o. Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
p. Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
q. Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).

Goals Specific to Research Universities

Academic Quality

a. Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
b. National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
c. Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



d. Number of Science & Engineering disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
e. Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
f. Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
g. Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
h. Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
i. Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
j. Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
k. Science & Engineering research expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 minus table 52).
l. National rank is higher than predicted by available Financial Resources ranking based on US News & World Report	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
m. Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
n. Percent of Research Doctoral Degrees Awarded in STEM	The percentage of research doctoral degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
o. Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

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FGCU

2012-13 DRAFT Work Plan



Florida Gulf Coast University

Work Plan Presentation for 2012-13 Board of Governors Review



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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- b. Enrollment Planning
- c. Academic Program Coordination

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

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

VISION STATEMENT (What do you aspire to?)

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

STATEMENT OF STRATEGY (How will you get there?)

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

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



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

The principal strengths of FGCU include: the success of its graduates; its focus on teaching; commitment to sustainable growth; emphasis on efficiency; engagement with its community; the quality of its facilities; location in the heart of Southwest Florida; potential to grow; state of the art technology; the quality of its academic support resources; and regional economic impact. Our biggest challenges come from the historic underfunding of the university compared to our State University System (SUS) peers and the loss of Public Education Capital Outlay (PECO) funding. Despite the significant challenges encountered, FGCU has been able to make considerable progress and has positioned itself for further growth but at a rate consistent with the resources available. It is now among the most efficient universities in the system.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1 Academic Quality - academic excellence will continue as a principal institutional goal. Assessment and continuous improvement will be tools in the vanguard of FGCU's further evolution into a fully comprehensive university. Regional accreditation, state licensure/national certification, and Board of Governors (BOG) planning and accountability requirements will ensure the integrity of our academic enterprise. Specialized accreditation will be sought, earned, and maintained for all appropriate disciplines. Within the next year alone, FGCU will achieve accreditation of its College of Education, Bower School of Music, and School of Resort and Hospitality Management. Revenue from enrollment growth and tuition increases will support this initiative.

2 Return on Investment - means FGCU dramatically will increase its degree production across the board including STEM areas to provide the educated workforce that drives economic development. Graduation rates will continue their overall positive trend, and FGCU will continue to demonstrate high levels of post-graduation employment and success that will support the projected growth of the region: in health care; education; management, finance, and real estate; information technology; the resort and hospitality industry; the life sciences; the environmental sciences and engineering; and the professions. Revenue from enrollment growth and tuition increases will support this initiative.

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



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
To achieve this FGCU will continue to focus on academic quality through the following: predominant use of full-time faculty providing instruction; maintenance of state-of-the-art facilities; use of technology to provide effective academic support; and the pursuit and maintenance of professional accreditation whenever possible.					
Avg. SAT Score	0%Δ ¹	1,531	1,531	1,533	1,535
Avg. High School GPA (on 4.0 scale)	0%Δ	3.4	3.4	3.4	3.5
Professional/Licensure Exam					
First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	1	1	2	3
Exams Below National/State Benchmark	n/a	2	2	1	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	0	0	2	3	
Operational Efficiency					
Freshman Retention Rate	-1Δ	75%	76%	77%	78%
FTIC Graduation Rates					
In 4 years (or less)	+8Δ	21%	21%	22%	23%
In 6 years (or less)	+12Δ	44%	45%	46%	50%
AA Transfer Graduation Rates					
In 2 years (or less)	-4Δ	30%	30%	31%	33%
In 4 years (or less)	+5Δ	62%	62%	63%	65%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric			
SUBTOTAL OF IMPROVING METRICS	3	2	5	5	
Return on Investment					
Bachelor's Degrees Awarded	88%Δ	1,616	1,810	1,955	2,111
Percent of Bachelor's Degrees in STEM	13%Δ	16%	16%	16%	17%
Master's Degrees Awarded	59%Δ	385	408	432	458
Percent of Master's Degrees in STEM	+1Δ	2%	2%	2%	4%
Percent of Baccalaureate Graduates ³ Employed in Florida	-9Δ	68%	68%	69%	70%
Percent of Baccalaureate Graduates ³ Continuing their Education (in FL)	+3Δ	21%	21%	22%	23%
Annual Gifts Received (\$M)	-52%Δ	\$ 15.1	\$18.1	\$12	\$14
Endowment (\$M)	94%Δ	\$ 56.7	\$60	\$65	\$71
SUBTOTAL OF IMPROVING METRICS	6	4	5	8	
TOTAL OF IMPROVING METRICS	9	6	12	16	

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric #1 Bachelor's Degrees Awarded to Minorities	100%Δ	289	317	348	421
Metric #2 Bachelor's Degrees in Areas of Strategic Emphasis	267%Δ	551	606	667	807
Metric #3 Percentage of Eligible Programs with Specialized Accreditation	+18Δ	59%	59%	93%	93%

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

Goal 1. Return on the Investment: (Strategic Growth) Increase enrollment according to the enrollment plan; increase degree production generally and within BOG-targeted areas.

Metric Bachelor's Degrees in STEM Fields	756%Δ	257	283	311	376
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Goal 2. Operational Efficiency: FGCU will continue to exhibit among the lowest costs per student credit hour among the SUS; it also will continue to employ technology to ensure conservation of energy; the generation of clean energy; and the preservation of its environment. FGCU will continue to exhibit among the lowest energy costs per square foot in the SUS.

Metric Total Expenditure per Student Credit Hour	-20%Δ	\$279	\$273	\$268	\$263
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OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 56.5	\$ 51.1	\$ 49.8	\$ 49.8	\$ 45.8	\$ 42.1
Tuition	\$ 23.7	\$ 28.0	\$ 33.7	\$ 39.0	\$ 48.1	n/a
TOTAL MAIN OPERATIONS	\$ 80.2	\$ 79.1	\$ 83.5	\$ 88.8	\$ 93.9	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	
Tuition	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	
TOTAL HSC	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	
Tuition	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	
TOTAL IFAS	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	
EDUCATION & GENERAL TOTAL REVENUES	\$ 80.2	\$ 79.1	\$ 83.5	\$ 88.8	\$ 93.9	\$ 102.8

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident students (as reported in the Annual Accountability Report). Note*: 2012-13 Appropriated tuition is based on the appropriated budget authority.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$ 13.6	\$ 24.4	\$ 29.7	\$ 36.5	\$ 38.8	n/a
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Contracts & Grants

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

Revenues	\$ 21.6	\$ 13.0	\$ 12.0	\$ 15.1	\$ 13.2	n/a
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Local Funds

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

Revenues	\$ 13.5	\$ 17.3	\$ 24.0	\$ 30.1	\$ 36.7	n/a
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Faculty Practice Plans

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

Revenues	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	\$ 0.0	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 48.7	\$ 54.7	\$ 65.7	\$ 81.7	\$ 88.7	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 128.9	\$ 133.8	\$ 149.2	\$ 170.5	\$ 182.6	n/a
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Undergraduate Resident Tuition Summary *(for 30 credit hours)*

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$384	\$642	\$1,204	\$1,849	\$2,592
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,727	\$1,791	\$1,883	\$1,984	\$2,073
TOTAL TUITION AND FEES	\$4,981	\$5,533	\$6,187	\$6,933	\$7,765

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	41.5%	43.3%	46.2%	45%	47.1%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$13,139	\$16,670	\$16,117	\$16,710	\$17,768
Student Loan Cohort Default Rate (2nd Year)	4.2%	4.6%	5.2%(Draft)	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	5.5%(Trial)	7.2%(Draft)	Not available	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,352	\$1,200	\$9,201	\$1,700	\$1,700	\$19,153
AT HOME	\$5,352	\$1,200	\$3,364	\$1,700	\$1,700	\$13,316

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT	
Below \$40,000	1,957	35%	\$10,431	\$(2,420)	\$7,284	\$3,505	
\$40,000-\$59,999	744	13%	\$13,254	\$588	\$4,258	\$3,766	
\$60,000-\$79,999	624	11%	\$14,887	\$2,148	\$2,711	\$4,340	
\$80,000-\$99,999	610	11%	\$15,211	\$2,490	\$2,393	\$4,265	
\$100,000 Above	1,621	29%	\$15,562	\$2,395	\$2,386	\$3,174	
Missing	0	0%	N/A	N/A	N/A	N/A	
TOTAL	5,556	100%	AVERAGE	\$14,385	\$1,305	\$3,523	\$2,900

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. Family Income Groups are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. Full-time Students is a headcount based on at least 24 credit hours during Fall and Spring terms. Average Gift Aid includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. Net Cost of Attendance is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. Net Tuition & Fees is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). Average Loan Amount includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line Average represents the average of all full-time undergraduate



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 19, 2012
Implementation Date (month/year):	July, 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire university
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$5,132,608
Total differential fee revenue generated in 2012-13 (projected):	\$10,481,393
Intended Uses	
For the hiring of faculty and staff, and to provide additional need-based student financial aid support.	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
If not approved, the university's academic programs and operations would be severely impacted. Access to education (e.g., programs and courses), and the quality of education (e.g., use of full-time faculty, maintenance of specialized accreditation, mean class size) at the institution would significantly decline. The differential is the only source of funds to hire new faculty and staff.	
Request to Modify or Waive Tuition Differential Uses	
(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))	
No request at this time	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Hire more faculty and staff to keep pace with enrollment growth, add breadth and depth to academic programs; and enhance student advising.	Enrollment grew by 5% from fall 2010 to fall 2012. 15 new faculty members were hired across a variety of academic programs providing additional depth and breadth to the curriculum. The automated advising software, Degree Works, was acquired and is being implemented to facilitate student advising
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	32
Total Number of Advisors Hired or Retained (funded by tuition differential):	4
Total Number of Course Sections Added or Saved (funded by tuition differential):	410 (in part as a result of the tuition differential)
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Provide additional need-based aid to students.	Need-based aid increased by about 18% over the prior year. In part due to the tuition differential.
Increase the number of students receiving need-based financial aid.	Approximately a 20% increase over the number of students who received need-based aid over the prior year In part due to the tuition differential.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	752
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,847
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$50
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$6,482.43



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
	Estimated Actual*	Estimated
	2011-12	2012-13
	-----	-----
FTE Positions:		
Faculty	32.00	75.00
Advisors	4.00	8.00
Staff		
Total FTE Positions:	36.00	83.00
Balance Forward from Prior Periods		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
Receipts / Revenues		
Tuition Differential Collections	\$ 4,522,976	10,481,393
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 4,522,976	\$ 10,481,393
Expenditures		
Salaries & Benefits	\$ 3,166,063	\$ 7,336,975
Other Personal Services	-	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	1,356,913	3,144,418
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ 4,522,976	\$ 10,481,393
Ending Balance Available:	\$ -	\$ -
*Since the 2011-12 year has not been completed, provide an estimated actual.		
**Provide details for "Other Categories" used.		



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	5.74	\$12.80	\$21.42	\$40.13	\$61.65	\$86.39	\$114.84
Total Base Tuition & Differential per Credit Hour	\$94.33	\$108.47	\$124.74	\$143.45	\$164.97	\$189.71	\$218.16
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$8.76	\$10.33	\$10.33
Activity & Service	\$11.24	\$11.24	\$11.24	\$11.58	\$11.92	\$12.28	\$12.64
Health	\$7.59	\$7.74	\$8.34	\$8.79	\$8.97	\$9.15	\$9.33
Athletic	\$15.54	\$15.79	\$16.54	\$16.79	\$17.13	\$17.47	\$17.82
Transportation Access	\$8.50	\$8.50	\$8.50	\$8.50	\$8.76	\$9.02	\$9.29
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$56.47	\$57.59	\$59.70	\$62.74	\$65.85	\$68.57	\$69.73
Total Tuition and Fees per Credit Hour	\$150.80	\$166.06	\$184.44	\$206.19	\$230.82	\$258.28	\$287.89
% Change		10.1%	11.1%	11.8%	11.9%	11.9%	11.5%
Fees (block per term):							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,949.10	\$5,691.30	\$6,544.80
Total Fees for 30 Credit Hours	\$1,694.10	\$1,727.70	\$1,791.00	\$1,882.20	\$1,975.52	\$2,057.03	\$2,091.85
Total Tuition and Fees for 30 Credit Hours	\$4,524.00	\$4,981.80	\$5,533.20	\$6,185.70	\$6,924.62	\$7,748.33	\$8,636.65
\$ Change		\$457.80	\$551.40	\$652.50	\$738.92	\$823.71	\$888.32
% Change		10.1%	11.1%	11.8%	11.9%	11.9%	11.5%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$484.42	\$518.32	\$559.80	\$604.58	\$652.95	\$705.19	\$761.60
Out-of-State Undergraduate Student Financial Aid ³	\$24.23	\$25.91	\$27.99	\$30.23	\$32.65	\$35.26	\$38.08
Total per credit hour	\$508.65	\$544.23	\$587.79	\$634.81	\$685.60	\$740.45	\$799.68
% Change		7.0%	8.0%	8.0%	8.0%	8.0%	8.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,949.10	\$5,691.30	\$6,544.80
Total Fees for 30 Credit Hours	\$16,953.60	\$18,054.60	\$19,424.70	\$20,926.50	\$22,543.45	\$24,270.51	\$26,082.25
Total Tuition and Fees for 30 Credit Hours	\$19,783.50	\$21,308.70	\$23,166.90	\$25,230.00	\$27,492.55	\$29,961.81	\$32,627.05
\$ Change		\$1,525.20	\$1,858.20	\$2,063.10	\$2,262.55	\$2,469.27	\$2,665.23
% Change		7.7%	8.7%	8.9%	9.0%	9.0%	8.9%
Housing/Dining⁴	\$8,728.00	\$8,894.00	\$9,160.82	\$9,435.64	\$9,718.71	\$10,010.28	\$10,310.58
\$ Change	\$0.00	\$166.00	\$266.82	\$274.82	\$283.07	\$291.57	\$300.30
% Change		1.9%	3.0%	3.0%	3.0%	3.0%	3.0%

Notes: (1) can be no more than 5% of tuition. (2) capped in statute. (3) can be no more than 5% of tuition and the out-of-state fee. (4) combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	117%Δ	6,469	63%	7,633	64%	8,397	65%	9,152	65%
FTIC (Profile Admit)	-12%Δ	334	3%	334	3%	301	2%	301	2%
AA Transfers*	40%Δ	2,016	20%	2,339	20%	2,479	19%	2,875	20%
Other Transfers	28%Δ	1,452	14%	1,670	14%	1,737	13%	1,789	13%
Subtotal	73%Δ	10,271	100%	11,976	100%	12,913	100%	14,117	100%
GRADUATE STUDENTS									
Master's	37%Δ	1,043	90%	1,085	90%	1,128	90%	1,173	90%
Research Doctoral	n/a%Δ	39	3%	43	4%	47	4%	52	4%
Professional Doctoral	n/a%Δ	71	6%	75	6%	78	xx%	82	6%
Subtotal	52%Δ	1,153	100%	1,202	100%	1,254	100%	1,307	100%
NOT-DEGREE SEEKING	9%Δ	614		477		489		230	
MEDICAL	n/a%Δ	n/a		n/a		n/a		n/a	
TOTAL	66%Δ	12,038		13,655		14,655		15,655	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL FTE		2012-13 PLANNED FTE		2013-14 PLANNED FTE		3 YEAR (2014-15) PLANNED FTE	
		% of TOTAL		% of TOTAL		% of TOTAL		% of TOTAL	
UNDERGRADUATE									
DISTANCE (>80%)	129%Δ	1,144	17%	1,236	16%	1,334	16%	1,441	16%
HYBRID (50%-79%)*	72%Δ	141	2%	155	2%	171	2%	188	2%
TRADITIONAL (<50%)	67%Δ	5,573	81%	6,505	83%	6,982	82%	7,448	82%
TOTAL	75%Δ	6,858	100%	7,884	100%	8,487	100%	9,076	100%
GRADUATE									
DISTANCE (80%)	43%Δ	211	28%	222	30%	233	30%	244	30%
HYBRID (50%-79%)*	152%Δ	83	11%	88	12%	93	12%	99	12%
TRADITIONAL (<50%)	34%Δ	447	60%	439	58%	462	58%	481	58%
TOTAL	44%Δ	741	100%	749	100%	788	100%	824	100%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Distance Learning is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). *Hybrid is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). Data not available before 2009. Trend data based on 2009-10 Traditional (and Technology Enhanced) refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for no more than 49% of instruction (per SUDS data element 2052).



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
<i>Florida Resident</i>								
LOWER DIVISION	2,224	3,723	2,224	4,058	4,422	4,786	5,551	8%
UPPER DIVISION	2,319	3,277	2,319	3,484	3,701	3,905	4,304	6%
GRAD I	510	578	510	605	630	652	691	4%
GRAD II	10	100	10	112	125	138	166	11%
TOTAL	5,063	7,678	5,063	8,259	8,878	9,481	10,713	7%
<i>Not a Florida Resident</i>								
LOWER DIVISION		208		222	238	254	285	7%
UPPER DIVISION		115		120	126	131	142	4%
GRAD I		27		28	29	30	31	3%
GRAD II		4		4	4	4	5	3%
TOTAL	310	354	310	374	397	419	462	5%
<i>TOTAL</i>								
LOWER DIVISION		3,931		4,280	4,660	5,040	5,836	8%
UPPER DIVISION		3,392		3,604	3,827	4,036	4,446	6%
GRAD I		605		633	659	682	722	4%
GRAD II		104		116	129	142	171	10%
TOTAL	5,373	8,032	5,373	8,632	9,275	9,900	11,175	7%
TOTAL (US FTE)	7,164	10,709	7,164	11,510	12,367	13,200	14,900	7%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Real Estate	521501		5	0	50	4/13
Earth and Space Science	400699	STEM	0	0	50	4/13
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Instructional Media	130501	STEM	3	3	50	4/13
Biology	260101	STEM	8	0	50	4/13
DOCTORAL PROGRAMS						

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Digital Media Design (Graphic Design)	500102	STEM	2	0	50	4/15
Renewable Energy Engineering	149999	STEM	0	0	50	4/15
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
DOCTORAL PROGRAMS						
Nursing Practice	513818	Health	7	3	50	4/15



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

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FIU

2012-13 Work Plan



Florida International University

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

Florida International University is an urban, multi-campus, public research university serving its students and the diverse population of South Florida. We are committed to high-quality teaching, state-of-the-art research and creative activity, and collaborative engagement with our local and global communities.

VISION STATEMENT (What do you aspire to?)

Florida International University will be a leading urban public research university focused on student learning, innovation, and collaboration.

STATEMENT OF STRATEGY (How will you get there?)

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

As our state digs out of the prolonged economic recession, the South Florida market is experiencing a rebound that bodes well for Greater Miami (employment up 1.6% compared to 0.7% statewide). Miami-Dade County Public Schools (MDCPS) continue to exceed expectations in student achievement, with a growing number of college ready students, particularly place bound minorities who are academically qualified to attend FIU (advanced placement examination pass rate increased 2.3% in MDCPS compared to 0.1% for US).

On the heels of these positive trends, the Beacon Council has just released One Community One Goal (OCOG), a jobs initiative targeted to growing industries and strengthening the local economy. The new plan pivots around education as the foundation for Miami-Dade County's economic development and calls for a new ecosystem of growth. FIU responded with a report showing how our current and planned initiatives are addressing job growth in six targeted industry clusters.

As the business community places a greater emphasis on the role of education in job creation, FIU is focusing on results-oriented initiatives to improve market related responsiveness. Our mission, vision and strategy for the 2012-13 academic year is geared to improving early employment-related matching of student interest and aptitudes with available majors and jobs to ensure a more efficient progression to degree and timely employment after. We are also directing additional support to new more performance oriented instruction in math, writing, and global learning—consistent with our transnational business location and multinational demographics. We intend to deepen our role as the nation's leading producer of STEM degrees for minority students through expanded science offerings, more peer-led learning groups, and progressive faculty-led curricular and applied market-based research. Consistent with our collaboration logic and our desire to be a solutions center for the community, we also plan to provide hundreds of new internships for students through expanded partnerships with both for-profit and not-for-profit businesses and organizations in Greater Miami. Finally, we will drive business and cost efficiencies through expanded use of on- and off-campus weekend classes (FIU has the highest classroom space utilization rate in the SUS at 176% of statutory requirements), reduced energy costs (FIU led the SUS in energy conservation for four consecutive years, 2007-2011), and new revenue through expanded market based, adult learner, degree programs.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

FIU's greatest strength is its close linkage to the community. As noted above, FIU provides the education and research to prepare our students for careers in the target industries identified in One Community One Goal. FIU reflects the community in its access and diversity. FIU serves the nation as a demonstration that diversity and excellence can be coterminous. We graduate more Hispanic STEM bachelor's and master's degree recipients than any other university in the country. A greater percentage of our doctoral degree recipients obtain faculty positions in universities than the national median. Our graduates lead the SUS in having jobs after graduation and in having high paying jobs. Our 6-year graduation rate for Hispanics is better than that of any other large Hispanic Serving Institution. That notable statement notwithstanding, we know we can do substantially better so our greatest opportunity in the next three years is to improve our six-year graduation rate.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1 Graduation Success Initiative (GSI): GSI is a comprehensive system for improving retention and graduation rates at FIU. FIU has used tuition differential dollars to hire 65 new faculty, advisors, and academic support staff for 2012-13; build an in-house degree audit system; launch MyMajorMatch, a career selection tool; and establish Major Maps for each undergraduate major. Recognizing mathematics as a major hurdle for many of our students, we re-designed College Algebra to marry high tech (computer-assisted teaching algebra) with high touch (individualized instruction using Learning Assistants). In the first year pass rate for College Algebra increased from 33% to 48%. Writing is equally as important as math. FIU has launched both Writing Across the Curriculum and Writing in the Discipline projects with faculty in many departments designing effective writing assignments and improving students' critical thinking through writing assisted by 55 writing fellows.

2 Enhancing STEM Success: FIU recognizes the importance of producing STEM graduates to grow the economy of Miami and Florida. STEM education starts in K-12 and FIU has partnered with Miami-Dade County Public Schools (MDCPS) to increase the number of STEM graduates teaching in the MDCPS system. The goal is 40 new STEM teachers per year by 2013 with degrees in a STEM discipline and an Education minor. This initiative is led by 17 faculty in 6 departments supported by over \$20M in active grants. Over the past five years, FIU has hired 45 new faculty in STEM disciplines, the number of physics majors has increased 400%, and STEM enrollments overall have doubled. FIU is the leader in Life Sciences South Florida, a consortium of 16 universities, colleges, economic development agencies, and research institutes developing the full potential of South Florida in the life sciences.

3 Preparing Students for the Workforce through Internships: FIU is increasing the number of internships available to students to gain practical workforce experience. During the last academic year 664 students were placed in internships and 1,326 took a course requiring an internship. FPL provides internships in its call center located on the FIU campus. Out of the first 22 interns, 16 became full-time employees with 9 of these in management positions. Other internship opportunities exist with Sotheby's International Realty, Jackson Health System, and the office of the Miami-Dade County Mayor. Our strong internship program is one of the reasons FIU has the highest percentage of graduates employed in the first year after graduation of any SUS institution.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
FIU has developed a five-year enrollment management plan that allows for significant growth in students, advisors and faculty. The faculty growth will be in strategic areas that enhance external funding and doctoral degree production. These are the primary metrics of national preeminence.					
Avg. SAT Score	-1.7% ¹	1700	1699	1699	1699
Avg. High School GPA (on 4.0 scale)	3%	3.7	3.7	3.7	3.8
Professional/Licensure Exam					
First-time Pass Rates²					
Exams Above National/State Benchmark	n/a	2	2	3	4
Exams Below National/State Benchmark	n/a	2	2	1	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	1	0	1	2	
Operational Efficiency					
Freshman Retention Rate	4%	82%	82%	82%	83%
FTIC Graduation Rates					
In 4 years (or less)	0%	19%	19%	20%	21%
In 6 years (or less)	-5%	41%	43%	44%	46%
AA Transfer Graduation Rates					
In 2 years (or less)	-3%	20%	20%	20%	21%
In 4 years (or less)	-2%	59%	59%	59%	60%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	1	1	2	5	
Return on Investment					
Bachelor's Degrees Awarded	31%	6,637	6,940	7,257	7,934
Percent of Bachelor's Degrees in STEM	-1.6%	17%	17%	17.5%	18%
Graduate Degrees Awarded	65%	2,971	3,321	3,513	4,154
Percent of Graduate Degrees in STEM	-6.2%	16%	16%	16.5%	17%
Percent of Baccalaureate Graduates Employed in Florida	-7%	66% ³	66%	66%	66%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	0%	21% ³	21%	21%	21%
Annual Gifts Received (\$M)	192%	\$40.5	\$14.9	\$24.1	\$114.6
Endowment (\$M)	70%	\$136.2	\$140.9	\$163.4	\$210.5
SUBTOTAL OF IMPROVING METRICS	4	3	6	6	
TOTAL OF IMPROVING METRICS	6	4	9	13	

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	450%	11	11	11	12
National Academy Members	100%	2	2	2	2
Number of Post-Doctoral Appointees	60%	40	57	62	66
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures <i>(based on 8 broad discipline areas, and includes private universities)</i>	n/a	2 ¹	2	2	2
SUBTOTAL OF IMPROVING METRICS	3		1	1	2
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) <i>(includes non-Science & Engineering disciplines)</i>	29.9%	\$110	\$114	\$120	\$139
Science & Engineering Research Expenditures (\$M)	48.6%	\$97.8	\$103	\$109	\$126
Percent of Research Expenditures funded from External Sources	15.6%	68.6%	68%	68%	68%
Patents Issued	-25 %	3	1	2	8
Licenses/Options Executed	0%	0	1	2	8
Licensing Income Received (\$M)	-68%	\$.012	\$ 0.01	\$ 0.03	\$ 0.1
Number of Start-up Companies	0%	0	1	2	6
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	20.5%	\$61,803,000	\$63,500,000	\$69,000,000	\$80,000,000
National Rank is Higher than Predicted by the Financial Resources Ranking <i>(based on U.S. News & World Report)</i>	n/a	NR	n/a	n/a	n/a
Research Doctoral Degrees Awarded	68%	148	151	159	177
Professional Doctoral Degrees Awarded	79%	226	232	256	305
SUBTOTAL OF IMPROVING METRICS	6		6	9	9
TOTAL OF IMPROVING METRICS	9		7	10	11

Notes: (1) The most recent Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures data is based on 2009-10 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric #1 Bachelor's Degrees Awarded to Minorities	39%	5,169	5,459	5,764	6,428
Metric #2 Bachelor's Degrees in Areas of Strategic Emphasis	32%	4,269	4,474	4,688	5,148
Metric #3 Graduate Degrees in Areas of Strategic Emphasis	72%	2,068	2,264	2,478	2,969

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

Goal 1. *The 2010-15 Worlds Ahead Strategic Plan encourages interdisciplinary teaching, advanced pedagogical approaches in the classroom, and expanded state-of-the-art online learning. Therefore, FIU plans to increase fully online student credit hours offered to 20% by year 2015. This will bring technology innovation to the classroom and provide current and prospective students additional access to higher education.*

Metric: Increase Percentage of Student Credit Hours Offered Fully Online	10%	16.4%	19%	19.25%	19.75%
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Goal 2. *The Strategic plan calls for increasing the percentage of full-time students at the lower, upper, GRAD 1 and GRAD 2 levels by 2 percent for year 2015. This goal is a building block in the University's effort to increase its graduation rate. The expectation is that increasing full-time enrollment as well as expanding student-support services will have a positive correlation with the number of students who complete their degrees within six years.*

Metric: Gradual Shift to a Higher Percentage of Full-time Students	2%	64%	65%	65.5%	66.5%
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OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$234.0	\$215.6	\$196.0	\$202.5	\$168.8	\$142.4
Tuition	\$124.7	\$133.6	\$138.4	\$165.2	\$188.3	n/a
TOTAL MAIN OPERATIONS	\$358.6	\$349.2	\$334.4	\$367.7	\$357.1	n/a
State Funds	\$5.3	\$11.5	\$22.3	\$26.1	\$26.3	\$26.9
Tuition	\$0.0	\$0.0	\$1.2	\$2.5	\$5.4	n/a
TOTAL HSC	\$5.3	\$11.5	\$23.5	\$28.6	\$31.7	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL IFAS	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 363.9	\$ 360.7	\$ 357.9	\$ 396.2	\$388.8	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$111.7	\$108.9	\$148.4	\$163.4	\$167.6	n/a
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Contracts & Grants

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

Revenues	\$80.7	\$80.8	\$88.9	\$91.2	\$94.8	n/a
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Local Funds

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

Revenues	\$103.5	\$108.1	\$135.3	\$175.8	\$190.7	n/a
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Faculty Practice Plans

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

Revenues	\$ 0	\$ 0	\$ 0	\$ 0	\$0.3	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$295.9	\$297.8	\$372.6	\$430.4	\$453.4	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$659.8	\$658.5	\$730.5	\$826.7	\$842.2	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$660	\$960	\$1,569	\$2,269	\$3,074
Percent Increase	15%	15%	15%	15%	15%
Required Fees¹	\$1,561	\$1,615	\$1,745	\$1,802	\$1,862
TOTAL TUITION AND FEES	\$5,091	\$5,675	\$6,414	\$7,171	\$8,036

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	27.62%	39%	44.07%	45.88%	49.58%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$10,361	\$13,597	\$14,873	\$16,419	\$16,978
Student Loan Cohort Default Rate (2nd Year)	4.3%	4.8%	5.8%	6.5%	7%
Student Loan Cohort Default Rate (3rd Year)	n/a	n/a	9.7%*	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students. *2009-2010 is the first draft 3-year default rate available.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES*	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,675	\$1,160	\$11,330	\$1,942	\$2,310	\$22,417
AT HOME	\$5,675	\$1,160	\$3,584	\$2,726	\$2,148	\$15,293

*Based on 30 credit hours.

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	8,023	51%	\$11,699	-\$2,753	\$7,717	\$7,230
\$40,000-\$59,999	1,557	10%	\$13,543	\$94	\$4,857	\$6,122
\$60,000-\$79,999	918	6%	\$14,432	\$1,467	\$3,521	\$6,286
\$80,000-\$99,999	607	4%	\$14,857	\$1,959	\$3,038	\$6,523
\$100,000 Above	1,721	11%	\$14,495	\$1,985	\$2,907	\$6,648
Missing	2,871	18%	n/a	n/a	n/a	n/a
TOTAL	15,697	100%	AVERAGE \$13,805	\$550.40	\$4,408	\$6,562

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 14 th , 2012
Implementation Date (month/year):	08/2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All Undergraduate Courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$32.00
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$20.29
\$ Increase in tuition differential for 30 credit hours:	\$608.70
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	\$15.6M
Total differential fee revenue generated in 2012-13 (projected):	\$40.5M
Intended Uses	
<p>\$13.3M Undergraduate Faculty hires to improve graduation and retention rates</p> <p>\$0.3M Disability Services to increase resources for deaf and hearing impaired students</p> <p>\$0.6M Undergraduate Studies Office to strengthen undergraduate experience and academic components.</p> <p>\$0.7M Undergraduate Tutoring Support - Writing Center - to strengthen students communications skills</p> <p>\$2.9M Summer Courses - Instructional Funding - Increase courses offered for the summer term.</p> <p>\$3.7M Student Support Advisors Services - Hire advisors to support Undergraduate Students.</p> <p>\$2.2M Library Inflationary - Inflation for Undergraduate Scholarly Journals and Database.</p> <p>\$4.2M Enrollment services and Retention – Improve enrollment management, course offerings and Student Success.</p> <p>\$0.3M Student Centered Learning environments</p> <p>\$12.3M Financial Aid</p>	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>In anticipation of the expected student growth and incremental differential tuition, for the next academic year FIU has hired an additional 38 faculty, 15 advisors, 2 writing laboratory instructors, and 10 academic support staff, all focused on undergraduate learning and success.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Undergraduate Faculty Hires	Continue to improve quality of instruction and minimize impact of budget reduction to course offerings and maintain enrollments.
Undergraduate Student Advisors	Continue to improve advisor to student ratios
Undergraduate Scholarly Journals and Database	Continue to maintain subscriptions and offset increased costs
Undergraduate Academic Support	Continue to improve writing center, resources for disabled students and security.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	208
Total Number of Advisors Hired or Retained (funded by tuition differential):	32
Total Number of Course Sections Added or Saved (funded by tuition differential):	992
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
FIU Tuition Differential Grants	Continue to provide aid to the neediest undergraduate students with Estimated Family Contribution = 0
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	5,688
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$642.42
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$93.75
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$750.00



TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES, & AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

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

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	95.31	149.81
Advisors	32.00	48.00
Staff	32.00	48.50
Total FTE Positions:	159.31	246.31
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ --	\$343,625
Less: Prior-Year Encumbrances	--	--
Beginning Balance Available:	\$ --	\$343,625
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$24,825,490	\$40,458,753
Interest Revenue - Current Year	--	--
Interest Revenue - From Carryforward Balance	--	--
Total Receipts / Revenues:	\$24,825,490	\$40,458,753
<u>Expenditures</u>		
Salaries & Benefits	\$13,303,356	\$22,238,189
Other Personal Services	727,164	1,067,883
Expenses	1,340,802	3,066,277
Operating Capital Outlay	1,865,528	2,163,606
Student Financial Assistance	7,245,015	12,266,423
Expended From Carryforward Balance	--	--
**Other Category Expenditures	--	--
Total Expenditures:	\$24,481,865	\$40,802,378
Ending Balance Available:	\$343,625	\$ (0)

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
<u>Tuition:</u>							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	13.74	\$22.00	\$32.00	\$52.29	\$75.64	\$102.48	\$133.35
Total Base Tuition & Differential per Credit Hour	\$102.33	\$117.67	\$135.32	\$155.62	\$178.96	\$205.80	\$236.67
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
<u>Fees (per credit hour):</u>							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$11.60	\$11.60	\$11.60	\$12.87	\$12.87	\$12.87	\$14.25
Health							
Athletic	\$14.51	\$14.51	\$15.56	\$16.10	\$16.10	\$18.10	\$18.10
Transportation Access							
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$39.71	\$40.43	\$42.24	\$46.05	\$46.05	\$48.05	\$49.43
Total Tuition and Fees per Credit Hour	\$142.04	\$158.10	\$177.56	\$201.67	\$225.01	\$253.85	\$286.10
% Change		11.3%	12.3%	13.6%	11.6%	12.8%	12.7%
<u>Fees (block per term):</u>							
Activity & Service							
Health	\$67.20	\$83.19	\$83.19	\$83.19	\$102.68	\$102.68	\$102.68
Athletic	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Transportation Access	\$77.00	\$81.00	\$81.00	\$88.94	\$98.00	\$98.00	\$98.00
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$154.20	\$174.19	\$174.19	\$182.13	\$210.68	\$210.68	\$210.68
% Change		13.0%	0.0%	4.6%	15.7%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.07	\$4,059.58	\$4,668.52	\$5,368.80	\$6,174.12	\$7,100.23
Total Fees for 30 Credit Hours	\$1,499.70	\$1,561.28	\$1,615.58	\$1,745.76	\$1,802.86	\$1,862.86	\$1,904.26
Total Tuition and Fees for 30 Credit Hours	\$4,569.60	\$5,091.35	\$5,675.16	\$6,414.28	\$7,171.66	\$8,036.98	\$9,004.49
\$ Change		\$521.75	\$583.81	\$739.12	\$757.38	\$865.32	\$967.52
% Change		11.4%	11.5%	13.0%	11.8%	12.1%	12.0%
<u>Out-of-State Fees</u>							
Out-of-State Undergraduate Fee	\$393.62	\$393.62	\$393.62	\$393.62	\$393.62	\$393.62	\$393.62
Out-of-State Undergraduate Student Financial Aid ³	\$19.68	\$19.68	\$19.68	\$19.68	\$19.68	\$19.68	\$19.68
Total per credit hour	\$413.30	\$413.30	\$413.30	\$413.30	\$413.30	\$413.30	\$413.30
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$15,468.90	\$15,929.07	\$16,458.61	\$17,067.55	\$17,767.83	\$18,573.15	\$19,499.26
Total Fees for 30 Credit Hours	\$2,090.10	\$2,151.68	\$2,206.01	\$2,336.19	\$2,393.29	\$2,453.29	\$2,494.69
Total Tuition and Fees for 30 Credit Hours	\$17,559.00	\$18,080.75	\$18,664.62	\$19,403.74	\$20,161.12	\$21,026.44	\$21,993.95
\$ Change		\$460.17	\$529.54	\$608.94	\$700.28	\$805.32	\$926.12
% Change		3.0%	3.3%	3.7%	4.1%	4.5%	5.0%
<u>Housing/Dining⁴</u>							
	\$9,713.48	\$9,983.97	\$10,123.97	\$9,995.72	\$10,525.45	\$10,732.36	\$11,341.81
\$ Change	\$0.00	\$270.49	\$140.00	-\$128.25	\$529.73	\$206.91	\$609.45
% Change		2.8%	1.4%	-1.3%	5.3%	2.0%	5.7%

¹ can be no more than 5% of tuition.³ can be no more than 5% of tuition and the out-of-state fee.² capped in statute.⁴ combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	1.7%	15,078	45.9%	16,973	47.9%	16,973	48.0%	17,285	47.9%
FTIC (Profile Admit)	-41.4%	224	0.7%	169	0.5%	169	0.5%	172	0.5%
AA Transfers*	52.7%	13,008	39.6%	13,623	38.5%	13,623	38.6%	13,874	38.5%
Other Transfers	32.3%	4,564	13.9%	4,637	13.1%	4,559	12.9%	4,723	13.1%
Subtotal	20.9%	32,874	100%	35,402	100.0%	35,324	100.0%	36,054	100.0%
GRADUATE STUDENTS									
Master's	6.9%	5,907	75.5%	7,573	79.4%	7,572	79.4%	7,711	79.5%
Research Doctoral	32.8%	1,175	15.0%	1,193	12.5%	1,193	12.5%	1,205	12.4%
Professional Doctoral	123.3%	737	9.4%	771	8.1%	771	8.1%	785	8.1%
Subtotal	16.0%	7,819	100%	9,537	100.0%	9,536	100.0%	9,701	100.0%
NOT-DEGREE SEEKING	103.3%	3,232		4,781		4,779		4,805	
MEDICAL	N/A	85		280		360		440	
TOTAL	17.6%	44,010		50,000		50,000		51,000	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	196.7%	3,872	17.3%	4,859	19.3%	5,313	21.1%	5,968	23.0%
HYBRID (50%-79%)	-83.4%	108	0.5%	327	1.3%	227	0.9%	116	0.4%
TRADITIONAL (<50%)	3.0%	18,401	82.2%	19,992	79.4%	19,638	78.0%	19,903	76.6%
TOTAL	12.9%	22,381	100%	25,178	100%	25,178	100%	25,987	100%
GRADUATE									
DISTANCE (80%)	295.2%	429	8.4%	390	8.4%	427	9.2%	473	10.0%
HYBRID (50%-79%)	46.3%	36	0.7%	42	0.9%	28	0.6%	14	0.3%
TRADITIONAL (<50%)	38.7%	4,658	90.9%	4,213	90.7%	4,190	90.2%	4,239	89.7%
TOTAL	46.7%	5,123	100%	4,645	100%	4,645	100%	4,726	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	7,860	9,208	7,860	9,884	9,884	10,269	10,671	2.99%
UPPER DIVISION	11,682	13,891	11,682	13,953	13,953	14,330	14,892	1.40%
GRAD I	2,588	2,713	2,588	2,613	2,613	2,665	2,770	0.42%
GRAD II	818	945	818	1,052	1,052	1,064	1,087	2.84%
TOTAL	22,948	26,757	22,948	27,502	27,502	28,328	29,420	1.92%
Not a Florida Resident								
LOWER DIVISION		565		596	596	620	644	2.65%
UPPER DIVISION		756		745	745	768	798	1.09%
GRAD I		580		546	546	557	579	-0.03%
GRAD II		424		434	434	440	457	1.51%
TOTAL	2,138	2,324	2,138	2,321	2,321	2,385	2,478	1.28%
LOWER DIVISION		9,774		10,480	10,480	10,889	11,315	2.97%
UPPER DIVISION		14,647		14,698	14,698	15,098	15,690	1.39%
GRAD I		3,292		3,159	3,159	3,222	3,349	0.34%
GRAD II		1,369		1,486	1,486	1,504	1,544	2.44%
TOTAL	25,086	29,082	25,086	29,823	29,823	30,713	31,898	1.87%
TOTAL (US FTE)	33,448	38,776	33,448	39,764	39,764	40,951	42,531	1.87%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	80	141	248	250	320	385	420	24.4%
NON-RESIDENT		26	32	30	40	55	60	18.2%
TOTAL	80	167	280	280	360	440	480	23.5%
Dentistry Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Veterinary Headcounts								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Environmental Policy & Management	03.0104	STEM	FAMU		32	2012
Law (LLM)	22.0202		FSU		24	2012
Forensic Science	43.0106	SECURITY	UF, UCF		50	2012
DOCTORAL PROGRAMS						

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Anthropology	45.0201	GLOBAL	FAU, FGCU, FSU, UF, UCF, USF, UNF		35	2013
Interdisciplinary Studies	30.0000		UCF, UNF		100	2014
Biochemistry	26.0202	STEM	FSU		15	2015
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Physician Assistant	51.0912	HEALTH	UF		30	2013
DOCTORAL PROGRAMS						
Administration of Justice	43.0104	SECURITY	FSU		35	2013
Creative Writing	23.1302	GLOBAL	none		20	2014
Linguistics	16.0102	GLOBAL	UF		15	2015
Mathematical Science	27.0101	STEM	UF, FSU, FAU, USF		25	2013
Pharmacy	51.2001	HEALTH	FAMU, UF, USF		400	2015



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 minus table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

FSU

2012-13 Work Plan



Florida State University

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

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

VISION STATEMENT (What do you aspire to?)

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

STATEMENT OF STRATEGY (How will you get there?)

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

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



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities and opportunities (aka “weaknesses”) for improvement?

Based on a national ranking of the top 100 public universities, it isn't surprising that every university ranked higher than FSU in quality also ranked higher in available resources. However, 49 of the institutions ranked lower in quality *also* had more resources than FSU. Thus, a core capability of Florida State University is its extraordinarily efficient and effective use of the resources entrusted to it. We intend to advance the important mission of FSU by deliberately leveraging our strengths and successes and by expanding opportunities through new partnerships. Our most immediate need is to hire additional faculty, and we will leverage recurring and nonrecurring funds to invest in new faculty, replacing the non-recurring funds with recurring revenue when it becomes available.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. **Entrepreneurial University program:** Across the U.S., most business courses are usually available only to business majors, yet entrepreneurs span a wide variety of majors, and to limit such valuable education to only those majoring in business is to lose out on opportunities to strengthen the value of degrees in other fields. As one example, consider the increased value of a degree in engineering if it is combined with the fundamental courses in business and entrepreneurship. FSU proposes to hire the faculty necessary to open a four-course sequence to all majors. In addition, we have philanthropic goals to bring entrepreneurs-in-residence to multiple colleges to enable faculty and students to take ideas to the marketplace, fund an enhanced start-up competition, create start-up incubators, create partnerships between business majors and STEM graduate students, and create a platform for investors to partner with the University. This program is designed to promote the job prospects and entrepreneurial potential of students and faculty, and to create new partnerships with industry.
2. **STEM excellence:** We intend to invest in energy and material sciences to ensure that we are national leaders in these critical fields. The opportunity to leverage the National High Magnetic Field Laboratory, High Performance Materials Institute, Center for Advanced Power Systems, and the Florida Center for Advanced Aero Propulsion (which have already created spin-offs such as Bing Energy, which may revolutionize fuel cell production) is enormous. Materials and energy research have perhaps the highest potential for innovation and job growth of any of the STEM fields because they impact so many areas, from cancer treatment to construction to energy storage to the speed of microprocessors. FSU is eager to begin to invest in these areas that will have immediate payoffs.
3. **Critical needs for student success:** The loss of faculty has resulted in decreased course availability and larger classes – with the likely result of increasing time to graduation. Longer graduation times are a significant waste of taxpayer dollars. Having fewer faculty members also diminishes the ability of the university to accomplish its research mission and expand contract and grant funding, all of which also reduce opportunities for graduate students and our undergraduate students who benefit by working directly with faculty in their research labs. We propose a deliberate effort to target faculty hiring to student needs at all levels.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
FSU plans to invest in hiring new faculty and strategically targeting high impact leaders in multiple disciplines. Pre-eminent universities are distinguished by the quality of their faculty reflected in the visibility and impact of their scholarship and the innovativeness and effectiveness of their teaching. Characteristic of pre-eminent universities is the presence of faculty members who have been recognized by prestigious awards and recognitions, such as Guggenheims, Nobel Prizes, various National Academic memberships, Fulbright awards, and others. World-Class Faculty members serve as national and international leaders in their disciplines, and their presence on a campus immediately and exponentially increases the quality of the student experience and the significance of research produced.					
Avg. SAT Score	3.0%	1,798.5	1,803.0	1,817.0	1,830.0
Avg. High School GPA (on 4.0 scale)	3.9%	3.76	3.79	3.80	3.82
Professional/Licensure Exam First-time Pass Rates					
Exams Above National/State Benchmark	n/a	4	4	5	5
Exams Below National/State Benchmark	n/a	1	1	0	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	2	2	2	4	4
Operational Efficiency					
Freshman Retention Rate	4%	92%	92%	92%	93%
FTIC Graduation Rates					
In 4 years (or less)	12%	56%	57%	58%	60%
In 6 years (or less)	6%	74%	74%	74%	75%
AA Transfer Graduation Rates					
In 2 years (or less)	5%	44%	45%	46%	46%
In 4 years (or less)	4%	78%	78%	79%	79%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric			
SUBTOTAL OF IMPROVING METRICS	6	2	3	3	5
Return on Investment					
Bachelor's Degrees Awarded	13.7%	7,886	7,849	7,600	7,700
Percent of Bachelor's Degrees in STEM	3.7%	15.4%	16%	17%	17%
Graduate Degrees Awarded including professional	25.2%	3,095	3,093	3,154	3,282
Percent of Graduate Degrees in STEM	1.3%	13.9%	16%	16%	17%
Percent of Baccalaureate Graduates Employed in FL	-5%	56%	57%	58%	60%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	1%	19%	20%	20%	21%
Annual Gifts Received (\$M)	-0.7%	\$ 49,913,159	\$ 55.0 M	\$ 65.0 M	\$ 85.0 M
Endowment (\$M)	+4.0%	\$ 525,259,759	\$ 525.0 M	\$ 565.0 M	\$ 645.0 M
SUBTOTAL OF IMPROVING METRICS	6	5	5	5	7
TOTAL OF IMPROVING METRICS	14	9	12	12	16



Note: Performance metrics are defined on pages 18-21.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	50%	9	10	14	16
National Academy Members	0%	6	6	6	7
Number of Post-Doctoral Appointees	-4%	241	217	221	230
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	7 (Footnote 1)	7	7	7
SUBTOTAL OF IMPROVING METRICS	1		1	2	3
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	9.8%	\$ 230.4	\$ 235.0	\$ 240.0	\$ 244.0
Science & Engineering Research Expenditures (\$M)	16.8%	\$ 216.9	\$ 221.0	\$ 225.0	\$ 229.0
Percent of Research Expenditures funded from External Sources	-5.5% (Footnote 2)	69%	68%	68%	70%
Patents Issued	200%	36	25	34	33
Licenses/Options Executed	450%	11	11	11	11
Licensing Income Received (\$M)	28.8%	\$ 1.47	\$ 1.25	\$ 1.25	\$ 1.25
Number of Start-up Companies	N/A% (Footnote 3)	4	1	3	4
Science & Engineering R&D Expenditures in non-Medical/Health Sciences	17.3%	\$208.1M	\$212.0M	\$216.0M	\$220.0M
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	101 (Footnote 4)	107	110	113	117
Research Doctoral Degrees Awarded	32.0%	429	433	441	459
Percent of Research Doctoral Degrees Awarded in STEM	1%	33.0%	33.0%	35%	37%
Professional Doctoral Degrees Awarded	40.9%	389	423	430	430
SUBTOTAL OF IMPROVING METRICS	10		6	9	10
TOTAL OF IMPROVING METRICS	11		7	11	13



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric #1 Average Time to Degree for FTICs	Improved .01 yr	3.90 yrs	3.90 yrs	3.88 yrs	3.87 yrs
Based on comparison of spring term only FTIC graduates from 2006-07 and 2010-11, the average time-to-degree of FTICs graduating dropped from 3.91 years to 3.90 years.					
Metric #2 Bachelor's Degrees in Areas of Strategic Emphasis	4.3%	3,033	3,064	3,097	3,125
Metric #3 Number of Faculty Designated a Highly Cited Scholar	n/a	7	7	7	8

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

Goal 1. Recruitment, development, and retention of outstanding, diverse faculty members are critical to being a pre-eminent university. World-class programs delivered by a dedicated and creative faculty inspire students to reach new levels of achievement. The focus on building the entrepreneurial program and in strengthening STEM requires hiring new faculty and replenishing losses in the tenured and tenure-track faculty ranks. We are challenged to enhance the opportunities we provide on campus to our most promising students, and hiring faculty with national and international preeminence as scholars and scientists is essential to continually improving the impact of our research programs and the quality of the education we provide.

Metric Number of Tenure/Tenure-earning faculty	-4.4%	1,040	1,004	1,040	1,060
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Goal 2. Enrich the student experience by supporting and improving undergraduate, graduate and professional education, with its accompanying positive effect on future graduates and the communities and professions they will serve. Our goal is student success, measured by high retention and graduation rates, access to cutting-edge knowledge, worthwhile employment and contributions to the vitality of our nation.

Metric: Number of Students Tutored in Gateway Courses	n/a	8,257	8,422	8,590	8,762
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Metric: Continuous improvement on the National Survey of Student Engagement (NSSE) Survey

The National Survey of Student Engagement (NSSE) is a tool used by many universities to measure critical features of quality by measuring the amount of time and effort students put into their studies and other activities as well as how the institution deploys its resources and organizes the curriculum and other learning opportunities. FSU continues to enhance its support of undergraduate success as evidenced in three National Survey of Student Engagement (NSSE) participations. NSSE defines five benchmark survey areas, each of which is critical to student engagement and ultimately successful completion of degrees. For each aggregate benchmark score (below) FSU has made continuous improvement. Our next NSSE participation is scheduled for 2013-14; we anticipate another increase in benchmark scores at this time.

NSSE Benchmark Scores						
Benchmark Name	2005		2008		2011	
	First-Year Student	Senior	First-Year Student	Senior	First-Year Student	Senior
Supportive Campus Environment (SCE)	57.5%	56.2%	62.2%	58.5%	67.5%	62.6%
Enriching Educational Experience (EEE)	27%	39.5%	29.1%	40.2%	30.3%	42.4%
Student-Faculty Interaction (SFI)	29.5%	41.4%	35.1%	41.9%	35.3%	43.3%
Active and Collaborative Learning (ACL)	36.2%	47.7%	40%	48%	40.2%	48.6%
Level of Academic Challenge (LAC)	48.5%	52%	53.1%	53.2%	53.6%	55.3%

Footnotes to support the Key Performance Indicators Section:

Footnote 1 -- The data reported is actual for FY 2009-10 rather than FY 2010-11. NSF has not published the FY 2010-11 data.

Footnote 2 --NSF changed its reporting format between FY 2005-06 and FY 2010-11 and the information for FY 2005-06 expenditures is not available to accurately calculate the 5 Year Trend. In FY 2005-06 FSU did not report the non-S&E data by funding source. Therefore the data is not available to determine how much of the non-S&E expenditures are not from external sources. We did report funding source data for the FY 2005-06 S&E expenditures so the computation for the 5 Year Trend only partially excludes non external expenditures.

Footnote 3 -- A percent value for the number of startups is not available because the FY 06 value is zero.

Footnote 4 -- Average of differences between 2006-07 USNWR Financial Rank and Overall Rank; and 2010-11 USNWR Financial Rank and Overall Rank.

Footnote 4 Detail	2006-07	2010-11
US News Rank	112	101
US News Financial Rank	207	208
Difference (Average = 101)	95	107



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 329.5	\$ 323.7	\$ 289.3	\$ 298.0	\$ 250.9	\$ 187.2
Tuition	\$ 124.0	\$ 126.1	\$ 141.8	\$ 159.1	\$ 166.1	n/a
TOTAL MAIN OPERATIONS	\$ 453.5	\$ 449.8	\$ 431.1	\$ 457.1	\$ 417.0	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	\$ 42.4	\$ 39.0	\$ 37.8	\$ 38.5	\$ 34.6	\$ 33.2
Tuition	\$ 5.7	\$ 6.5	\$ 7.1	\$ 7.9	\$ 8.6	n/a
TOTAL HSC	\$ 48.1	\$ 45.5	\$ 44.9	\$ 46.4	\$ 43.2	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL IFAS	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 501.6	\$ 495.3	\$ 476.0	\$ 503.5	\$ 460.0	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds appropriated by the Florida Legislature (as reported in the Annual Accountability Report). This does not include technical adjustments the university makes between budget entities. Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident students (as reported in the Annual Accountability Report). Note*: 2012-13 Appropriated tuition is based on the appropriated budget authority.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$ 209.6	\$ 188.2	\$ 184.0	\$ 199.6	\$ 208.0	n/a
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Contracts & Grants

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

Revenues	\$ 195.1	\$ 192.9	\$ 196.1	\$ 212.5	\$ 235.6	n/a
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Local Funds

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

Revenues	\$ 167.1	\$ 175.6	\$ 194.2	\$ 220.8	\$ 229.0	n/a
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Faculty Practice Plans

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

Revenues	\$ 4.8	\$ 4.9	\$ 5.4	\$ 6.3	\$ 6.8	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 501.6	\$ 495.3	\$ 476.0	\$ 503.5	\$ 460.0	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 1,078.2	\$ 1,056.9	\$ 1,055.7	\$ 1,142.7	\$ 1,139.4	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870.10	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
Tuition Differential Fee	\$660.00	\$960.00	\$1,568.70	\$2,268.90	\$3,074.10
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,707.70	\$1,765.60	\$1,815.40	\$1,873.00	\$1,933.00
TOTAL TUITION AND FEES	\$5,237.80	\$5,825.20	\$6,483.70	\$7,241.50	\$8,106.70

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	48%	48%	48%	54%	51%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$16,927	\$19,364	\$20,993	\$22,139	\$22,683
Student Loan Cohort Default Rate (2nd Year)	3.0%	3.4%	5.4%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	4.5%	5.4%	n/a until 2013	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,514	\$1,000	\$9,412	\$1,254	\$2,880	\$20,060
AT HOME	\$5,514	\$1,000	\$4,706	\$2,880	\$2,880	\$15,354

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	5,143	25%	\$11,375	(\$3,262)	\$8,394	\$3,946
\$40,000-\$59,999	2,195	10%	\$14,183	(\$430)	\$5,521	\$3,726
\$60,000-\$79,999	2,142	10%	\$16,032	\$1,466	\$3,627	\$2,749
\$80,000-\$99,999	1,952	9%	\$16,631	\$2,039	\$3,016	\$3,614
\$100,000 Above	8,541	41%	\$16,915	\$2,240	\$2,735	\$2,332
Missing	1,071	5%	\$19,246	\$4,644	\$499	\$256
TOTAL	21,044	100%	AVERAGE \$15,279	\$642	\$4,412	\$2,928

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 8, 2012
Implementation Date (month/year):	August, 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	The maximum tuition differential of 15% will be assessed and will apply to all university undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$32.00
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$20.29
\$ Increase in tuition differential for 30 credit hours:	\$608.70
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$13,564,927
Total differential fee revenue generated in 2012-13 (projected):	\$31,351,573
Intended Uses	
<p>Describe how the revenue will be used.</p> <p>Funds will be used to hire additional faculty to support our three key initiatives: (1) Entrepreneurial University program; (2) STEM excellence; and (3) Critical needs for student success, which includes pressure enrollment areas.</p>	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>If the increase is not approved, we will not be able to hire faculty in key areas. This will delay graduation for many and continue to increase class size. Unfortunately, six years of highly constrained resources have severely limited our ability to innovate. Faculty numbers at FSU have dropped by an average of 50 each year of the last four years. Nearly 80 STEM faculty members have left FSU during the last 5 years. Budget constraints have made it impossible to hire new STEM faculty for 20 of these positions. Thirteen College of Business faculty members have left since 2010, including eminent scholars in finance and real estate. Many of these individuals accepted jobs elsewhere because other institutions offered higher salaries. Others retired and could not be replaced.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	
N/A	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
27 faculty positions were allocated to the Colleges, all of which off-set previous faculty losses.	8 faculty were hired in the College of Arts and Sciences, 2 in the College of Social Sciences, 3 in the College of Communication and Information, 8 in the College of Education, 2 in the College of Business, 2 in the College of Music, 2 for the Panama City campus, 2 faculty to support Distance Learning, 1 for the Learning Systems Institute and 2 in the College of Visual Arts, Theatre and Dance
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	32
Total Number of Advisors Hired or Retained (funded by tuition differential):	n/a
Total Number of Course Sections Added or Saved (funded by tuition differential):	123
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Funds were distributed to undergraduate students who exhibit financial need	\$3,171,811 was disbursed to students with need for 2011-12
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	3,384
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,742
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$112
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$3,700



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 164020 (Student and Other Fees Trust Fund)		
	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	148.93	176.93
Advisors	35.00	35.00
Staff	8.68	9.18
Total FTE Positions:	192.61	221.11
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ 6,907,412	4,353,663
Less: Prior-Year Encumbrances	80,314	100,000
Beginning Balance Available:	\$ 6,827,098	\$ 4,253,663
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 17,786,636	31,351,573
Interest Revenue - Current Year		
Interest Revenue - From Carryforward Balance		
Total Receipts / Revenues:	\$ 17,786,636	\$ 31,351,573
<u>Expenditures</u>		
Salaries & Benefits	\$ 10,499,728	\$ 20,000,000
Other Personal Services	374,041	500,000
Expenses	107,177	150,000
Operating Capital Outlay	0	0
Student Financial Assistance	3,171,811	7,241,292
Expended From Carryforward Balance	6,107,314	4,000,000
**Other Category Expenditures	0	0
Total Expenditures:	\$ 20,260,071	\$ 31,891,292
Ending Balance Available:	\$ 4,353,663	\$ 3,713,944
*Since the 2011-12 year has not been completed, provide an estimated actual.		
**Provide details for "Other Categories" used.		



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	13.74	\$22.00	\$32.00	\$52.29	\$75.63	\$102.47	\$133.33
Total Base Tuition & Differential per Credit Hour	\$102.33	\$117.67	\$135.32	\$155.61	\$178.95	\$205.79	\$236.65
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76	\$4.76
Activity & Service	\$9.96	\$11.69	\$11.69	\$12.24	\$12.85	\$13.49	\$14.16
Health	\$8.81	\$12.44	\$12.96	\$13.42	\$14.09	\$14.79	\$15.52
Athletic	\$6.77	\$7.24	\$7.39	\$7.54	\$7.91	\$8.30	\$8.71
Transportation Access	\$7.40	\$7.90	\$8.40	\$8.90	\$9.17	\$9.44	\$9.73
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student Life & Services Fee (UNF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Marshall Center Fee (USF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student Affairs Facility Use Fee (FSU only)	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00	\$2.00
Total Fees	\$48.54	\$55.59	\$57.52	\$59.18	\$61.10	\$63.10	\$65.20
Total Tuition and Fees per Credit Hour	\$150.87	\$173.26	\$192.84	\$214.79	\$240.05	\$268.89	\$301.85
% Change		14.8%	11.3%	11.4%	11.8%	12.0%	12.3%
Fees (block per term):							
Activity & Service	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Health	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Athletic	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Transportation Access	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Marshall Center Fee (USF only)	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Student Affairs Facility Use Fee (FSU only)	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Total Block Fees per term	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60	\$4,668.30	\$5,368.50	\$6,173.70	\$7,099.50
Total Fees for 30 Credit Hours	\$1,496.20	\$1,707.70	\$1,765.60	\$1,815.40	\$1,873.00	\$1,933.00	\$1,996.00
Total Tuition and Fees for 30 Credit Hours	\$4,566.10	\$5,237.80	\$5,825.20	\$6,483.70	\$7,241.50	\$8,106.70	\$9,095.50
\$ Change		\$671.70	\$587.40	\$658.50	\$757.80	\$865.20	\$988.80
% Change		14.7%	11.2%	11.3%	11.7%	11.9%	12.2%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$458.56	\$458.56	\$481.48	\$481.48	\$481.48	\$481.48	\$481.48
Out-of-State Undergraduate Student Financial Aid ³	\$22.92	\$22.92	\$24.07	\$24.07	\$24.07	\$24.07	\$24.07
Total per credit hour	\$481.48	\$481.48	\$505.55	\$505.55	\$505.55	\$505.55	\$505.55
% Change		0.0%	5.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$16,826.70	\$17,286.90	\$18,504.00	\$19,112.70	\$19,812.90	\$20,618.10	\$21,543.90
Total Fees for 30 Credit Hours	\$2,183.80	\$2,395.30	\$2,487.70	\$2,537.50	\$2,595.10	\$2,655.10	\$2,718.10
Total Tuition and Fees for 30 Credit Hours	\$19,010.50	\$19,682.20	\$20,991.70	\$21,650.20	\$22,408.00	\$23,273.20	\$24,262.00
\$ Change		\$671.70	\$1,309.50	\$658.50	\$757.80	\$865.20	\$988.80
% Change		3.5%	6.7%	3.1%	3.5%	3.9%	4.2%
Housing/Dining⁴	\$7,858.00	\$8,340.00	\$9,180.00	\$9,942.00	\$10,563.00	\$11,222.65	\$11,925.68
\$ Change		\$482.00	\$840.00	\$762.00	\$621.00	\$659.65	\$703.03
% Change		6.1%	10.1%	8.3%	6.2%	6.2%	6.3%

¹ can be no more than 5% of tuition.³ can be no more than 5% of tuition and the out-of-state fee.² capped in statute.⁴ combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND <i>(2006-07 to 2010-11)</i>	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR <i>(2014-15)</i> PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	-0.6%Δ	22,481	72.6%	23,160	74.8%	23,560	76.1%	23,660	76.4%
FTIC (Profile Admit)	-48.9%Δ	91	0.3%	90	0.3%	90	0.3%	90	0.3%
AA Transfers*	19.8%Δ	6,736	21.8%	6,500	21.0%	6,300	20.4%	6,200	20.0%
Other Transfers	-18.3%Δ	1,639	5.3%	1,200	3.9%	1,000	3.2%	1,000	3.2%
Subtotal	1.8%Δ	30,946	100%	30,950	100%	30,950	100%	30,950	100%
GRADUATE STUDENTS									
Master's	2.7%Δ	4,539	56.6%	4,584	56.6%	4,676	56.6%	4,770	56.6%
Research Doctoral	7.5%Δ	2,710	33.8%	2,737	33.8%	2,792	33.8%	2,848	33.8%
Professional Doctoral	1.3%Δ	772	9.6%	780	9.6%	795	9.6%	811	9.6%
Subtotal	4.1%Δ	8,021	100%	8,101	100%	8,263	100%	8,428	100%
NOT-DEGREE SEEKING	-0.8%Δ	1,322		1,322		1,322		1,322	
MEDICAL	115.9%Δ	475		480		480		480	
TOTAL	2.8%Δ	40,764		40,853		41,015		41,180	

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

	5 YEAR TREND (2006-07 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	2.1%Δ	640.85	2.9%	650.52	2.9%	650.37	2.9%	650.66	2.9%
HYBRID (50%-79%)	n/aΔ	121.95	0.5%	123.79	0.5%	123.76	0.5%	123.82	0.5%
TRADITIONAL (<50%)	-2.6%Δ	21,708.28	96.6%	22,035.70	96.6%	22,030.86	96.6%	22,040.53	96.6%
TOTAL		22,471.08	100%	22,810.00	100%	22,805.00	100%	22,815.00	100%
GRADUATE									
DISTANCE (80%)	2.6%Δ	381.81	7.0%	387.03	7.0%	394.76	7.0%	402.69	7.0%
HYBRID (50%-79%)	n/aΔ	171.84	3.1%	174.19	3.1%	177.67	3.1%	181.24	3.1%
TRADITIONAL (<50%)	-5.7%Δ	4,929.44	89.9%	4,996.79	89.9%	5,096.58	89.9%	5,199.07	89.9%
TOTAL		5,483.09	100%	5,558.00	100%	5,569.00	100%	5,783.00	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
<i>Florida Resident</i>								
LOWER DIVISION	9,327	10,194	9,327	9,919	9,900	9,900	9,900	-0.6%
UPPER DIVISION	10,713	11,647	10,713	11,896	11,900	11,900	11,900	0.4%
GRAD I	2,536	2,273	2,536	2,296	2,342	2,389	2,485	1.9%
GRAD II	1,743	2,006	1,743	2,026	2,067	2,108	2,194	1.9%
TOTAL	24,319	26,120	24,319	26,137	26,209	26,297	26,479	0.3%
<i>Not a Florida Resident</i>								
LOWER DIVISION	621	521	621	504	509	514	524	0.1%
UPPER DIVISION	644	476	644	491	496	501	511	1.5%
GRAD I	589	510	589	515	525	536	557	1.8%
GRAD II	629	714	629	721	735	750	780	1.8%
TOTAL	2,483	2,221	2,483	2,231	2,265	2,301	2,372	1.4%
<i>TOTAL</i>								
LOWER DIVISION	9,948	10,715	9,948	10,423	10,409	10,414	10,424	-0.5%
UPPER DIVISION	11,357	12,123	11,357	12,387	12,396	12,401	12,411	0.5%
GRAD I	3,125	2,783	3,125	2,811	2,867	2,925	3,042	1.9%
GRAD II	2,372	2,720	2,372	2,747	2,802	2,858	2,974	1.9%
TOTAL	26,802	28,341	26,802	28,368	28,474	28,598	28,851	0.4%
TOTAL (US FTE)	35,736	37,788	35,736	37,824	37,965	38,131	38,468	0.4%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

<i>Medicine Headcounts</i>								
FLORIDA RESIDENT	n/a	470	n/a	475	475	475	475	0.2%
NON-RESIDENT	n/a	6	n/a	5	5	5	5	-3.3%
TOTAL	480	476	480	480	480	480	480	0.2%
<i>Dentistry Headcounts</i>								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	N/a	n/a	n/a	n/a	n/a	%
<i>Veterinary Headcounts</i>								
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	n/a	n/a	N/a	n/a	n/a	n/a	n/a	%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
BS in Professional Communication	9.0900				140	Fall 2012

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

M in Risk Management & Insurance	52.1701	workforce	UF		50	Sum 2013
M Hospitality & Tourism	52.0901	workforce	USF, UCF, FIU	FIU	50	Spring 2013
M in Curriculum & Instruction	13.0301	education	UWF, USF	USF, UWF, UCF, FGCU	280	Sum 2012
S in Curriculum & Instruction	13.0301	education	UWF, USF	USF	20	Sum 2012
D in Curriculum & Instruction	13.0301	education	UWF, USF	USF	50	Sum 2012
M in Information Technology	11.0103	STEM	USF, FIU, FAU		52	Sum 2012
M in Corporate & Public Communication	09.0900				40	Fall 2012
M in Public Safety and Security	43.0103	security	USF, FIU, FAU		30	Spring 2013
M in Applied Economics	45.0602	workforce			25	Fall 2012

DOCTORAL PROGRAMS

New Programs To Be Considered by University in 2013-15 for Implementation

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

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

DOCTORAL PROGRAMS



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
a. National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
b. Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
c. Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
d. Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
e. Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
f. Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the second year.
g. FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
h. AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
i. Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment

j. Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
k. Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
l. Master's Degrees Awarded	This is a count of graduate degrees granted.
m. Percent of Master's Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
n. Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
o. Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
p. Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
q. Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).

Goals Specific to Research Universities

Academic Quality

a. Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
b. National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
c. Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



d. Number of Science & Engineering disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
e. Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
f. Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
g. Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
h. Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
i. Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
j. Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
k. Science & Engineering research expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 minus table 52).
l. National rank is higher than predicted by available Financial Resources ranking based on US News & World Report	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
m. Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
n. Percent of Research Doctoral Degrees Awarded in STEM	The percentage of research doctoral degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
o. Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

NCF

2012-13 Work Plan



New College of Florida

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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1. STRATEGY

- a. Mission Statement
- b. Vision Statement
- c. Statement of Strategy
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2. KEY PERFORMANCE INDICATORS

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

3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

New College offers an undergraduate liberal arts education of the highest quality in the context of a small, residential public honors college with a distinctive academic program¹ which develops the student's intellectual and personal potential as fully as possible; encourages the discovery of new knowledge and values while providing opportunities to acquire established knowledge and values; and fosters the individual's effective relationship with society.

¹ New College's distinctive academic program includes the following practices: contracts negotiated between a student and their faculty advisor for each academic semester, stipulating goals, objectives, and criteria for certification; narrative evaluations for each student in every class and tutorial; each student is required to complete a senior thesis/senior project; each student passes a Baccalaureate Exam with a committee of three faculty.

VISION STATEMENT (What do you aspire to?)

New College aspires to:

- a. Become the first choice of students who value academic rigor and intellectual exploration in equal measure.
- b. Maintain ranking within the top ten public undergraduate liberal arts colleges in the nation.
- c. Increase our percentage of under-represented students.
- d. Increase our endowment (capital campaign goals), diversify our sources of revenues.
- e. Integrate student life and academic life so that they are not competing realms but working together to support student success.

STATEMENT OF STRATEGY (How will you get there?)

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

We are a highly selective institution in terms of admissions, competing against the best liberal arts colleges in the nation. As part of our integrated marketing initiative, we are preparing new admissions materials focused on our core values. In practice, we believe our personalized and intensive "academic contract" curriculum, individual and small-group instruction, student-faculty scholarly collaboration, and senior thesis are crucial to our strong market leadership. Where our practices have drifted, we are realigning our practice with our values by hosting discussions about the academic program open to faculty, staff, and students, developing best practices from the seminars on critical inquiry, and providing additional academic support to students in need. The comprehensive strategy that covers the student experience from recruitment to graduation should be compelling to prospective students and donors supporting the capital campaign to raise funds for current and new initiatives.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

The foundation of New College's success is its exemplary academic program, in which dedicated teacher-scholars guide talented students in the creative pursuit of knowledge, preparing them for graduate study and success in the world of work. Under the energetic leadership of a new President, New College is poised to connect more deeply to the world through partnerships with the local community, networks with other innovative liberal arts colleges, outreach efforts of our capital campaign, and through our integrated marketing initiative. To achieve our full potential as an institution, we will continue to work with the BOG to resolve any friction between the core features of our program (narrative evaluations, senior thesis, and academic contracts) and federal regulations/state statutes based on GPA and credit hours associated with more traditional academic programs. We should also expand academic support services, promote teamwork skills and teamwork experiences for student learners, and redouble our efforts to create a more diverse campus community.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. Academic Quality: Research Participation. 100% of New College graduates complete a senior research thesis or creative project. This initiative provides a pathway along which students strengthen their preparation for research and creative work at every level, beginning in the first year. We are partnering with 6 colleges to share best practices and assess the senior thesis to improve teaching and learning. We will strengthen writing and critical inquiry skills to provide the foundation for successful research. We will correlate individual student experiences with assessments of their thesis work to gain insights that will improve teaching and thesis advising. We will emphasize model senior projects as a valued alternative to the 70-page written analytical thesis.

2. Operational Efficiency: First-Year Retention Rate. Paying special attention to the first-year retention rate will improve our 4- and 6-year graduation rate. The first-year retention rate was 82% Fall 2010 and 86% Fall 2011. We reaffirm our goal to reach 90% by Fall 2013. A strategy for achieving the goal includes supporting and growing the "Seminars in Critical Inquiry," - SCI students have higher retention rates. These Seminars expose students to scholarly writing and critical thinking skills early. In addition, developing our student's foundational skills and information literacy through targeted academic workshops and support services in strategic learning areas (writing, quantitative reasoning skills, interpersonal communication, and educational technology and foreign language instruction) will boost student retention also. The Academic Resource Center in the Cook Library provides these services.

3. Return on Investment: Endowment. Central to New College's return on investment will be "The New College Promise," a six-year campaign to raise \$60 million dollars for our endowment. The campaign's overall focus is student and faculty retention, college access, and connecting excellence in Florida to the world. Spearheaded by the New College Foundation, the campaign will substantially increase student scholarships, especially for under-represented students; triple the College's privately funded endowment via outright and planned gifts; double the number of endowed faculty positions; substantially increase funds available for faculty and student research and travel; complete funding for the planned International Studies building and other campus building projects; launch an endowment and expand research and reference collections of the Jane Bancroft Cook Library. One year after initiating the "quiet" phase in 2011, the New College Promise has produced gifts totaling \$21 million.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
We will maintain or improve our top ten national ranking in these two measures: U.S. News & World Report ranked New College No. 6 among all public liberal arts colleges in its annual rankings of the Best National Liberal Arts Colleges for 2012. The Princeton Review and USA Today named New College the No. 3 Best Value Public College in America in their 2012 list of "100 Best Value Colleges."					
Avg. SAT Score	(0.2%) ¹	1,954	1,946	1,940	1,940
Avg. High School GPA (on 4.0 scale)	2.0%	4.0	4.0	4.0	4.0
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a				
Exams Below National/State Benchmark	n/a				
Percent of Undergraduate Seniors Participating in a Research Course	100%	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	1	0	0	0	0
Operational Efficiency					
Freshman Retention Rate	6%	86%	88%	90%	90%
FTIC Graduation Rates					
In 4 years (or less)	12%*	57%	58%	60%	60%
In 6 years (or less)	11%*	68%	70%	70%	70%
AA Transfer Graduation Rates					
In 2 years (or less)	12%	17%	18%	20%	20%
In 4 years (or less)	(33%)	67%	67%	68%	70%
Percent of Bachelor's Degrees Without Excess Hours	-	-	-	-	-
SUBTOTAL OF IMPROVING METRICS	4	4	4	4	1
Return on Investment					
Bachelor's Degrees Awarded	28%	167	179	178	189
Percent of Bachelor's Degrees in STEM	7%	31%	25%	30%	30%
Graduate Degrees Awarded	%Δ				
Percent of Graduate Degrees in STEM	%Δ				
Percent of Baccalaureate Graduates Employed in Florida (see footnote)	(16%)	29% ³	30%	32%	35%
Percent of Baccalaureate Graduates Continuing their Education (in FL) (see footnote)	(6%)	10% ³	15%	15%	20%
Annual Gifts Received (\$M)	123%	\$2,991	\$1,525	\$4,600	\$ 6,500
Endowment (\$M)	(8%)	\$ 29,670	\$ 30,200	\$35,000	\$ 39,000
SUBTOTAL OF IMPROVING METRICS	3	4	3	3	5
TOTAL OF IMPROVING METRICS	8	8	7	7	6

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



* The base information for the trends is Academic Year 2001-2002 entering cohort, the first cohort after New College of Florida became independent.

New College Footnote: New College prepares Florida undergraduates to attend the best graduate and professional degree programs in the U.S. FETPIP provides a good starting point, but does not give a complete metric for graduate school and professional school attendance. New College uses the National Clearinghouse database on graduate/professional school attendance which shows that 44% of 2010 NCF graduates attended graduate/professional school within one year of graduation. 68% of 2006 NCF graduates attended graduate/professional school within 5 years of graduation. FETPIP Florida employment data provides an initial indication but is limited to those graduates employed in Florida in the month of October following their graduation. Our direct survey of 2010 NCF graduates showed 37% were employed within one year of graduation.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014- 15)
1. Freshman in Top 10% of Graduating High School Class	6%	50%	43%	45%	50%
2 Average Time to Degree for FTICs	0%	4.3	4.3	4.2	4.2
3 Bachelor's Degrees in Areas of Strategic Emphasis ¹	15%	54%	50%	50%	50%

¹ The percentage of Bachelor's degrees in areas of strategic emphasis is based on students' academic concentrations. New College academic program offers more than thirty academic concentrations leading to a bachelor's degree.



KEY PERFORMANCE INDICATORS

Institution Specific Goals (continued)

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

Goal 1. Campus and Educational Diversity. Develop a campus environment that supports diverse perspectives and maintains a climate of civility and mutual respect. Promote, sponsor, and sustain curricular, programmatic and/or administrative initiatives to foster and educate faculty, staff and students about racial, ethnic, cultural, socioeconomic, and intellectual diversity.

Metric: Student response to NSSE Diversity question: How often have you **	FY 0%	2.80		2.90	2.90
a) Had serious conversations with students of a different race or ethnicity than your own?	SR 9%	2.77	N/A	2.80	2.80
b) Had serious conversations with students who are very different from you in terms of their religious beliefs, political opinions, or personal values?	FY 4%	3.20		3.25	3.25
	SR 3%	2.78		2.80	2.80

** Scale: 1=never, 2=sometimes, 3=often, 4=very often. FY is First Year Response; SR is Senior Year Response.

Goal 2. Writing and Critical Inquiry. Introduce first and second year students to the foundations of research, writing, and critical thinking to create the skills and scholarly preparation for successful research and writing within the discipline.

Metric: Minimum % of Seminar in Critical Inquiry (SCI) students whose writing skills were less than satisfactory on the first paper who show improvement by the 4th paper on each of 15 learning outcomes. ²	N/A ³	72%	73%	74%	75%
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² SCI student work is assessed based on 15 learning outcomes. This metric focuses on the students who begin the seminar with unsatisfactory writing skills – the weakest students. In 2010-11, between 72% -100% of these weak students showed improvement on 13 of 15 learning outcomes. SCI courses are designed to improve writing and critical inquiry skills and improve retention. An additional goal is faculty development - training faculty in an effective pedagogy for improving student writing and critical inquiry. Many faculty teach SCI once, but do not repeat the same class a second time. Although those faculty tend to use the strategies in other classes, only the SCI classes are tracked for assessment purposes.

³ New College is unable to provide 5-year trend information. Seminar in Critical Inquiry (SCI) program started in fall 2009.



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 18.8	\$ 17.2	\$ 16.6	\$ 17.8	\$ 15.0	\$ 14.1
Tuition	\$ 4.0	\$ 4.0	\$ 4.5	\$ 4.7	\$ 5.4	n/a
TOTAL MAIN OPERATIONS	\$ 22.8	\$ 21.2	\$ 21.1	\$ 22.5	\$ 20.4	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds						
Tuition						
TOTAL HSC						
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds						
Tuition						
TOTAL IFAS						
EDUCATION & GENERAL TOTAL REVENUES	\$ 22.8	\$ 21.2	\$ 21.1	\$ 22.5	\$ 20.4	n/a
Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report).						
OTHER BUDGET ENTITIES						
Auxiliary Enterprises						
Resources associated with auxiliary units that are self supporting through fees, payments and charges. Examples include housing, food services, bookstores, parking services, health centers.						
Revenues	\$ 5.3	\$ 5.5	\$ 5.9	\$ 6.1	\$ 5.9	n/a
Contracts & Grants						
Resources received from federal, state or private sources for the purposes of conducting research and public service activities.						
Revenues	\$ 1.1	\$ 1.4	\$ 1.5	\$ 2.1	\$ 2.3	n/a
Local Funds						
Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.						
Revenues	\$ 3.9	\$ 4.1	\$ 4.6	\$ 4.7	\$ 4.7	n/a
Faculty Practice Plans						
Revenues/receipts are funds generated from faculty practice plan activities.						
Revenues	\$ 0	\$ 0	\$ 0	\$ 0	\$ 0	n/a
OTHER BUDGET ENTITY TOTAL REVENUES	\$ 10.3	\$ 11.0	\$ 12.0	\$ 12.9	\$ 12.9	n/a
UNIVERSITY REVENUES GRAND TOTAL	\$ 33.1	\$ 32.2	\$ 33.1	\$ 35.4	\$ 33.3	n/a



FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$ 384	\$ 642	\$1,204	\$1,849	\$2,591
Percent Increase	15%	15%	15%	15%	15%
Required Fees¹	\$1,216	\$1,308	\$1,349	\$1,390	\$1,433
TOTAL TUITION AND FEES	\$4,470	\$5,050	\$5,653	\$6,339	\$7,124

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	24%	41%	36%	32%	41%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$13,162	\$14,794	\$11,458	\$14,172	\$18,623
Student Loan Cohort Default Rate (2nd Year)	6.4%	5.4%	3.3%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	9.6%	5.4%	10.1%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$6,060	\$800	\$8,598	\$1,100	\$2,500	\$19,058
AT HOME	\$6,060	\$800	\$1,800	\$1,100	\$2,500	\$12,260

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	160	25%	\$9,022	(\$4,200)	\$9,960	\$3,097
\$40,000-\$59,999	81	13%	\$12,368	(\$813)	\$6,556	\$2,957
\$60,000-\$79,999	75	12%	\$13,173	\$167	\$5,555	\$2,540
\$80,000-\$99,999	55	9%	\$13,625	\$537	\$5,127	\$1,608
\$100,000 Above	223	35%	\$13,851	\$451	\$5,205	\$1,467
Missing	47	7%	\$15,284	\$1,876	\$3,797	\$810
TOTAL	641	100%	AVERAGE \$12,465	(\$791)	\$6,494	\$2,152

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	Projected to be June 16, 2012
Implementation Date (month/year):	7/12
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire College
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All Courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours	\$561.30
Incremental differential fee revenue generated in 2012-13 (projected):	\$411,655
Total differential fee revenue generated in 2012-13 (projected):	\$872,266
Intended Uses	
In 2012-13 Tuition Differential will support: Seminars in Critical Inquiry (QEP), the Writing Resource Center, the Quantitative Resource Center, the Pritzker Marine Science Program, the Gender Studies Program, Library Faculty, and Adjunct Faculty and in all three academic divisions.	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>The College's base recurring expenses are approximately \$2 million greater than recurring revenues. Our budget plans for 2012-13 rely on the 15% tuition increase and will require another \$1.55 million of reserves to cover critical recurring expenses. Without a 15% tuition increase, it will be necessary to spend down more reserve funds. This will bring the College dangerously close to falling below statutory reserves by 2013-14, and threaten our ability to maintain the College's core academic program. From FY 2007-08 to 2011-12, recurring state appropriations to the College have decreased by approximately \$5 million (> 25%). In response, the College has significantly reduced operating costs and enhanced operating efficiencies. For example, the College has eliminated staff positions; instituted across-the-board reductions in operating expenses (10% in FY 2009-10 and an additional 5% in FY 2011-12); and used adjuncts while postponing searches for open tenure-track faculty positions. In addition, the College has long-standing agreements to share operating costs (an SUS "best practice") for certain support functions with its SUS neighbors the University of South Florida Sarasota-Manatee and the FSU Ringling Museum. The College and USF S-M share the cost of operating the Jane Bancroft Cook Library, Student Counseling & Wellness Center, Campus Police Services and Campus Bookstore Services. The College and FSU Ringling Museum have co-located their chiller plants in the same facility, and share certain campus architect and building code administration costs. All of these actions, in conjunction with systematically increasing tuition rates, have enabled the College to maintain its core academic program.</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
“Seminars in Critical Inquiry” constitute a program of first-year courses designed to introduce students to foundations of research, writing, and critical thinking. The Tuition Differential Funds ensure that the program can continue. These funds support faculty development (including stipends to create new courses), adjunct replacements, salaries of the Director and Assistant Director, and assessment related to this program.	<ul style="list-style-type: none"> 5 seminars were offered by New College faculty, all of which were new offerings (newly structured as QEP classes) and represented courses in the Social Sciences and Humanities. 69 students were enrolled in these courses. A QEP Consultant was hired to review the progress of the QEP (the QEP is a core component of the SACS accreditation process). 9 faculty, 2 administrators, 1 instructional staff, and 3 students participated in the external consultant's visit to evaluate the progress of the program (1 additional faculty member and 1 additional student participated by email). Recommendations from this evaluation will be used to further develop the QEP assessment plan for the coming year.
Academic Resource Center (ARC) , including Language Resource Center (LRC), Writing Resource Center (WRC), Quantitative Resource Center (QRC), and Educational Technology Services (ETS)	<p>The ARC in Cook Library provided key support services in writing, foreign language instruction, quantitative and computational analyses, and educational technology.</p> <ul style="list-style-type: none"> WRC conducted 215 individual writing conferences. 23 in class presentations, 16 workshops and writing events, and 9 creative writing collaborative meetings. 100% of students said they would return to the WRC QRC led over 400 tutoring sessions in mathematics and statistics and 150 consultation sessions with thesis students in statistics and methods. ETS initiated an equipment replacement cycle and updated software for multimedia creation and production.
Environmental Studies Program	Staff support and adjunct teaching for Environmental Studies curricula, student research, and campus environmental stewardship.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	0.875
Total Number of Advisors Hired or Retained (funded by tuition differential):	3.1
Total Number of Course Sections Added or Saved (funded by tuition differential):	5
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Provided Need-Based Aid	\$141,424
Additional Information (estimates as of April 30, 2012):	



Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	26
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$5439
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$386
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$9500



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

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

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	0.875	16.9
Advisors	3.1	2.625
Staff	-	-
Total FTE Positions:	3.975	19.525
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
	\$	
Tuition Differential Collections	471,411	872,266
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward	-	-
Balance	-	-
	\$	
Total Receipts / Revenues:	471,411	872,266
<u>Expenditures</u>		
	\$	\$
Salaries & Benefits	268,553	341,007
Other Personal Services	36,708	245,983
Expenses	24,726	23,596
Operating Capital Outlay	-	-
Student Financial Assistance	141,424	261,680
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
	\$	\$
Total Expenditures:	471,411	872,266
	\$	\$
Ending Balance Available:	0	0

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University: New College of Florida

<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	5.74	\$12.80	\$21.42	\$40.13	\$61.64	\$86.38	\$114.83
Total Base Tuition & Differential/Credit Hour	\$94.33	\$108.47	\$124.74	\$143.45	\$164.96	\$189.70	\$218.15
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.14	\$6.14	\$6.14	\$6.14
Activity & Service	\$16.65	\$16.65	\$16.65	\$16.65	\$17.48	\$18.35	\$19.26
Health	\$4.58	\$4.58	\$4.58	\$4.58	\$4.81	\$5.05	\$5.30
Athletic	\$3.72	\$4.97	\$6.28	\$6.28	\$6.59	\$6.92	\$7.26
Transportation Access							
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)	\$0.00	\$0.00	\$1.00	\$1.00	\$1.00	\$1.00	\$1.00
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$38.55	\$40.52	\$43.59	\$44.97	\$46.34	\$47.78	\$49.28
Total Tuition and Fees per Credit Hour	\$132.88	\$148.99	\$168.33	\$188.42	\$211.30	\$237.48	\$267.43
% Change		12.1%	13.0%	11.9%	12.1%	12.4%	12.6%
Fees (block per term):							
Activity & Service							
Health							
Athletic							
Transportation Access							
Total Block Fees per term	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,948.80	\$5,691.00	\$6,544.50
Total Fees for 30 Credit Hours	\$1,156.50	\$1,215.60	\$1,307.70	\$1,349.10	\$1,390.20	\$1,433.40	\$1,478.40
Total Tuition and Fees for 30 Credit Hours	\$3,986.40	\$4,469.70	\$5,049.90	\$5,652.60	\$6,339.00	\$7,124.40	\$8,022.90
\$ Change		\$483.30	\$580.20	\$602.70	\$686.40	\$785.40	\$898.50
% Change		12.1%	13.0%	11.9%	12.1%	12.4%	12.6%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$571.49	\$588.63	\$609.23	\$609.23	\$627.50	\$646.32	\$665.70
Out-of-State Undergraduate Student Financial Aid ³	\$28.57	\$29.43	\$30.46	\$30.46	\$31.37	\$32.31	\$33.28
Total per credit hour	\$600.06	\$618.06	\$639.69	\$639.69	\$658.87	\$678.63	\$698.98
% Change		3.0%	3.5%	0.0%	3.0%	3.0%	3.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$21,795.90	\$22,932.90	\$23,494.20	\$24,714.90	\$26,049.90	\$27,513.90
Total Fees for 30 Credit Hours	\$2,013.60	\$2,098.50	\$2,221.50	\$2,262.90	\$2,331.30	\$2,402.70	\$2,476.80
Total Tuition and Fees for 30 Credit Hours	\$4,843.50	\$23,894.40	\$25,154.40	\$25,757.10	\$27,046.20	\$28,452.60	\$29,990.70
\$ Change		\$18,966.00	\$1,137.00	\$561.30	\$1,220.70	\$1,335.00	\$1,464.00
% Change		670.2%	5.2%	2.4%	5.2%	5.4%	5.6%
Housing/Dining⁴	\$7,782.00	\$8,225.00	\$8,597.00	\$8,597.00	\$8,855.00	\$9,121.00	\$9,395.00
\$ Change	\$0.00	\$443.00	\$372.00	\$0.00	\$258.00	\$266.00	\$274.00
% Change		5.7%	4.5%	0.0%	3.0%	3.0%	3.0%

¹ can be no more than 5% of tuition. ² capped in statute. ³ can be no more than 5% of tuition and the out-of-state fee. ⁴ combine the most popular housing and dining plans provided to students.



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	13%	697	87%	721	88%	725	88%	730	88%
FTIC (Profile Admit)	N/A ¹	5	1%	6	1%	6	1%	6	1%
AA Transfers* ²	(23%)	36	5%	35	4%	35	4%	35	4%
Other Transfers ²	(35%)	62	8%	60	7%	61	7%	61	7%
Subtotal	5%	800		822		827		832	
GRADUATE STUDENTS									
Master's	%Δ	.	.	.	.	.	.	.	.
Research Doctoral	%Δ	.	.	.	.	.	.	.	.
Professional Doctoral	%Δ	.	.	.	.	.	.	.	.
Subtotal	%Δ	.	.	.	.	.	.	.	.
NOT-DEGREE SEEKING	%Δ	.	.	.	.	.	.	.	.
MEDICAL	%Δ	.	.	.	.	.	.	.	.
TOTAL	5%	800		822		827		832	

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

¹ 5-year trend is not provided, because NCF had zero FTIC profile admit students in 2005-06.

² Since independence, NCF has increased its efforts to recruit more AA transfers in support of the state articulation agreement. It is difficult to recruit transfer students because transfer students often seek an option that allows them to attend school part-time. In addition, New College is able to dedicate only .5 FTE to transfer recruitment, due to state budget cuts.

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

	5 YEAR TREND <i>(2005-06 to 2010-11)</i>	2010-11		2012-13		2013-14		3 YEAR <i>(2014-15)</i>	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	%Δ	0		0		0		0	
HYBRID (50%-79%)	%Δ	0		0		0		0	
TRADITIONAL (<50%)	0%	683	100%	696	100%	700	100%	704	100%
TOTAL	0%	683	100%	696	100%	700	100%	704	100%
GRADUATE									
DISTANCE (80%)	%Δ								
HYBRID (50%-79%)	%Δ								
TRADITIONAL (<50%)	%Δ								
TOTAL	%Δ								

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
<i>Florida Resident</i>								
LOWER DIVISION	124	159	124	150	151	152	154	1%
UPPER DIVISION	419	441	419	430	433	435	441	1%
GRAD I								%
GRAD II								%
TOTAL	543	600	543	581	584	588	595	1%
<i>Not a Florida Resident</i>								
LOWER DIVISION		37		39	39	39	40	1%
UPPER DIVISION		82		76	77	77	78	1%
GRAD I								%
GRAD II								%
TOTAL	113	119	113	115	116	117	118	1%
<i>TOTAL</i>								
LOWER DIVISION		196		189	190	191	194	1%
UPPER DIVISION		523		507	510	513	519	1%
GRAD I								%
GRAD II								%
TOTAL	656	719	656	696	700	704	713	1%
TOTAL (US FTE)	875	959	875	928	933	939	950	1%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

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

New Programs To Be Considered by University in 2013-15 for Implementation

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



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

UCF

2012-13 Work Plan



University of Central Florida

Work Plan Presentation for 2012-13 Board of Governors Review



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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2. KEY PERFORMANCE INDICATORS

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

3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of Central Florida is a public multi-campus, metropolitan research university that stands for opportunity. The university anchors the Central Florida city-state in meeting its economic, cultural, intellectual, environmental, and societal needs by providing high-quality, broad-based education and experience-based learning; pioneering scholarship and impactful research; enriched student development and leadership growth; and highly relevant continuing education and public service initiatives that address pressing local, state, national, and international issues in support of the global community.

VISION STATEMENT (What do you aspire to?)

UCF has embarked on a bold venture to become a new kind of university that provides leadership and service to the Central Florida city-state. While sustaining bedrock capabilities in the future, the university will purposely pursue new strengths by leveraging innovative partnerships, effective interdisciplinarity, and a culture of sustainability highlighted by a steadfast commitment to inclusiveness, excellence, and opportunity for all.

STATEMENT OF STRATEGY (How will you get there?)

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

UCF will pursue our goals by favoring tactics that feature partnerships and interdisciplinary approaches to problems of significance to the university and the Central Florida city-state. We will sustain our abiding commitments to inclusiveness, excellence in all endeavors, and opportunity for all. UCF plans to sustain programs in its areas of historic strength – such as engineering, business, computer sciences, the natural sciences, and teacher education – and have the confidence and nimbleness to exploit strategic opportunities in areas as diverse as medicine, the performing arts, and emerging fields.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

- Opportunities: High student retention, progression, and graduation rates; M.D. program and supporting initiatives, including new bio-related programs; graduate study and research in both traditional and emerging disciplines; 2+2 *DirectConnect* program; university efficiencies in utilities, maintenance, and property management; and ample opportunities for academic community engagement and partnerships.
- Challenges: High student-to-faculty ratio; high transfer population resulting in a greater proportion of high-cost, major-specific course offerings, which are more costly than general education course work; and, significant recurring budget reductions, along with the lack of fiscal stability for planning purposes.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1 – Faculty: Hire additional full-time faculty in areas of specific focus (e.g. STEM, area of strategic programmatic emphasis, and emerging fields).

Hiring full-time faculty enhances the undergraduate and graduate academic experience by ensuring the availability of course offerings to meet overall enrollment growth, decreasing class size, increasing student retention and graduation, supporting undergraduate and graduate research, and stabilizing UCF's student to faculty ratio. An emphasis on hiring tenure and tenure-track faculty addresses the overall mix of faculty and recent reliance on non-tenure-track faculty, while boosting our growing research promise and potential economic impact.

2 – Research and Graduate Activity: Increase graduate degree program breadth, interdisciplinarity, and quality, while enhancing the volume and impact of UCF research.

Increasing graduate activity supports the emerging preeminence of UCF's graduate enterprise as indicated by the most recent 2013 Best Graduate Schools' rankings from *U.S. News & World Report*, including 20 UCF programs listed in the top 100 with 7 ranked in the top 50. To ensure the continued growth and quality, UCF plans to develop programs across a broader range of disciplines focusing on interdisciplinary programs and research. 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 last decade.

3 – College of Medicine: Continue development of the necessary infrastructure to ensure the success of the College of Medicine M.D. program.

The College of Medicine and its Lake Nona and Central Florida partners are building a medical city, forming partnerships to improve the quality of healthcare in the city-state, and creating an economic engine with a projected multi-billion dollar economic impact for the region. Development of the infrastructure requires continued hiring of medical faculty members and essential staff members, achievement of full accreditation, continued implementation of the College of Medicine Faculty Practice, initiating the development of new graduate medical education programs in Central Florida, and expansion of biomedical and clinical research.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
UCF plans to improve graduate and overall rankings by hiring additional faculty members in select areas to enhance graduate program quality, student selectivity, research volume and impact.					
Avg. SAT Score	1% ¹	1736	1750	1752	1756
Avg. High School GPA (on 4.0 scale)	6%	3.72	3.78	3.80	3.82
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	2	2	2	3
Exams Below National/State Benchmark	n/a	0	0	0	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	2	3	3	3	3
Operational Efficiency					
Freshman Retention Rate	5%	87%	88%	88%	89%
FTIC Graduation Rates					
In 4 years (or less)	3%	35%	36%	36%	37%
In 6 years (or less)	5%	62%	63%	64%	65%
AA Transfer Graduation Rates					
In 2 years (or less)	-7%	28%	28%	29%	29%
In 4 years (or less)	-1%	67%	67%	68%	68%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	3	5	5	5	5
Return on Investment					
Bachelor's Degrees Awarded	32%	10,646	11,400	12,200	13,500
Percent of Bachelor's Degrees in STEM	0%	16%	17%	17%	18%
Graduate Degrees Awarded	25%	2,538	2,625	2,700	2,780
Percent of Graduate Degrees in STEM	2%	27%	28%	28%	28%
Percent of Baccalaureate Graduates Employed in Florida	-12%	65% ³	65%	66%	68%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	1%	18% ³	18%	19%	19%
Annual Gifts Received (\$M)	-37%	\$ 19.7	\$ 16.5	\$ 21.5	\$ 34.5
Endowment (\$M)	30%	\$ 125.7	\$ 130.0	\$ 136.0	\$ 145.0
SUBTOTAL OF IMPROVING METRICS	6	7	8	8	8
TOTAL OF IMPROVING METRICS	11	15	16	16	16

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	-20%	4	5	8	12
National Academy Members	n/a	1 ¹	1	1	2
Number of Post-Doctoral Appointees	n/a	58	65	68	75
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	4 ¹	4	4	5
SUBTOTAL OF IMPROVING METRICS	0		4	4	4
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	-11%	\$ 109.2	\$ 125.0	\$ 127.5	\$ 132.5
Science & Engineering Research Expenditures (\$M)	-10%	\$ 97.3	\$ 110.0	\$ 112.5	\$ 117.5
Percent of Research Expenditures funded from External Sources	16%	84%	85%	86%	87%
Patents Issued	162%	76	80	85	90
Licenses/Options Executed	133%	14	10	12	15
Licensing Income Received (\$M)	150%	\$ 0.5	\$ 0.6	\$ 0.8	\$ 0.8
Number of Start-up Companies	0%	2	2	3	4
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	-11%	\$ 95.1	\$ 107.5	\$ 107.5	\$ 107.5
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	NR-FR 177-265	n/a	n/a	n/a
Research Doctoral Degrees Awarded	38%	245	238	245	255
Professional Doctoral Degrees Awarded	n/a	40	36	110	122
SUBTOTAL OF IMPROVING METRICS	6		8	10	10
TOTAL OF IMPROVING METRICS	6		12	14	14

Notes: (1) the most recent faculty Awards data is based on 2009-10 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Bachelor's Degrees in Areas of Strategic Emphasis	31%	3,406	3,640	3,850	4,200
Graduate Degrees in Areas of Strategic Emphasis	29%	1,252	1,290	1,825	1,860
Bachelor's Degrees Awarded to Minorities	64%	2,543	2,850	3,050	3,510

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

Goal 1. College of Medicine: Continue development of the necessary infrastructure to ensure success of the College of Medicine M.D. program. *As the inaugural M.D. class enters its fourth and final year, UCF looks to achieve several critical milestones: full accreditation from the Liaison Committee on Medical Education in 2013, graduation and residency placement of the inaugural class in 2013, expansion of the COM Faculty Practice to cover all non-faculty costs in 2014-15; a fully-enrolled education program with 480 students in 2016, creation of a Graduate Medical Education Program (residency and/or fellowship programs), and creation of collaborative research and graduate programs with other units and colleges of the university and medical city partners.*

LCME Accreditation, M.D. Enrollment (GME Application Progress)	n/a	Preliminary, 100 (n/a)	Provisional, 180 (n/a)	Achieve Full, 280 (apply)	Full, 420 (approved)
UCF Health Faculty Practice (percent of non-faculty costs covered by practice revenue)	n/a	0%	25%	50%	100%

Goal 2. Be America's leading partnership university. *The UCF business incubation program supports the Central Florida economy by providing early-stage companies with tools, training, and infrastructure needed to create financially stable high growth and impact enterprises. In the past decade, the program has helped emerging companies create over \$500 million in annual revenue and more than 1,600 new jobs with an average salary of \$59,000.*

Total Jobs Created by Incubator Companies	138%	1,575	1,700	1,850	2,000
Total Companies Graduated by Incubators	100%	66	72	80	90



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 286.5	\$ 268.8	\$ 249.9	\$ 258.2	\$ 223.4	\$168.4
Tuition	\$ 118.3	\$ 137.2	\$ 159.0	\$ 184.6	\$ 206.4	n/a
TOTAL MAIN OPERATIONS	\$ 410.3	\$ 414.9	\$ 417.0	\$450.7	\$ 444.6	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	\$ 4.5	\$ 8.8	\$ 19.0	\$ 21.4	\$ 22.2	\$ 23.0
Tuition	\$ 0	\$ 0	\$ 0.8	\$ 2.4	\$ 4.6	n/a
TOTAL HSC	\$ 4.5	\$ 8.8	\$ 20.0	\$ 24.5	\$ 26.9	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	n/a	n/a	n/a	n/a	n/a	n/a
Tuition	n/a	n/a	n/a	n/a	n/a	n/a
TOTAL IFAS	n/a	n/a	n/a	n/a	n/a	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 414.9	\$ 423.7	\$ 437.0	\$ 475.1	\$ 471.5	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$ 117.0	\$ 132.5	\$ 128.0	\$ 136.5	\$ 148.4	n/a
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Contracts & Grants

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

Revenues	\$114.3	\$ 116.2	\$ 107.8	\$ 108.4	\$ 110.0	n/a
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Local Funds

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

Revenues	\$ 283.2	\$ 328.4	\$ 388.4	\$ 445.6	\$ 493.1	n/a
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Faculty Practice Plans

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

Revenues	n/a	n/a	\$ 0.0	\$ 0.0	\$ 0.7	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 514.5	\$ 577.1	\$ 624.1	\$ 690.6	\$ 752.0	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 929.3	\$ 1,000.8	\$ 1,061.3	\$ 1,165.7	\$ 1,214.0	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$476	\$749	\$1,326	\$1,989	\$2,753
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,674	\$1,736	\$1,821	\$1,946	\$2,061
TOTAL TUITION AND FEES	\$5,021	\$5,584	\$6,247	\$7,035	\$7,914

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	45%	46%	46%	49%	51%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$19,234	\$20,088	\$20,484	\$19,730	\$19,356
Student Loan Cohort Default Rate (2nd Year)	4.0%	3.3%	4.4%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	6.3%	6.1%	7.7%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$4,518	\$924	\$8,574	\$1,800	\$2,276	\$18,092
AT HOME	\$4,518	\$924	\$4,450	\$1,800	\$2,276	\$13,968

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	6,424	21%	\$11,552	\$-657	\$5,757	\$6,105
\$40,000-\$59,999	3,137	10%	\$13,200	\$862	\$4,158	\$5,454
\$60,000-\$79,999	2,850	9%	\$14,426	\$1,987	\$3,020	\$5,924
\$80,000-\$99,999	2,600	8%	\$14,829	\$2,326	\$2,671	\$6,132
\$100,000 Above	8,503	28%	\$15,061	\$2,397	\$2,577	\$6,391
Missing	6,892	23%	\$15,374	\$2,658	\$2,126	\$10,228
TOTAL	30,406	100%	AVERAGE \$14,073	\$1,596	\$3,385	\$6,706

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	5/24/2012 (anticipated)
Implementation Date (month/year):	8/2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire university.
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate courses.
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$24.96
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$19.24
\$ Increase in tuition differential for 30 credit hours:	\$577.20
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	\$19,836,047
Total differential fee revenue generated in 2012-13 (projected):	\$44,057,092
Intended Uses	
Differential tuition revenue is essential to the university to maintain and/or increase undergraduate course offerings, maintain and/or hire faculty members teaching undergraduate courses, and support other activities, initiatives, and services that will directly enhance the overall undergraduate experience and improve student retention and graduation rates.	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>Without differential tuition, the University of Central Florida's ability to continue to provide high-quality access to undergraduate degrees is at risk. During the past five years, UCF's undergraduate student population has increased by 26 percent in response to our commitment to serve the growing needs of our community and provide high-quality undergraduate degrees for Florida residents. During that same period, funding reductions to our E&G base budget have totaled just under \$144 million (a 49 percent reduction to our state-allocated budget).</p> <p>UCF's current student-to-faculty ratio is 31.7 to 1. To maintain the current ratio, UCF needed to add 68 additional full-time faculty members during 2011-12. However, differential tuition funds supported an increase of only 23 full-time faculty members. Differential tuition is essential to help slow the student-to-faculty ratio increase.</p> <p>Furthermore, without additional tuition revenues to maintain vital student support services for our general and at-risk populations, retention and graduation rates will be severely compromised. For instance, without differential tuition, UCF's average undergraduate class size of 51 students will increase.</p> <p>Under normal economic conditions, differential tuition funds available over the past several years would have served to enhance rather than only maintain the quality of undergraduate education and related student-support services for our continuing and new students. However, despite past tuition increases and the careful restructuring of operations and thoughtful planning in response to the economic crisis, available funds are still insufficient to offset past state reductions, let alone address further reductions, rising expenses due to inflation, and UCF's commitment to growth and access.</p> <p>Differential tuition is an essential tool for UCF to continue our commitment to access and to provide a high-quality education to students.</p>	
Request to Modify or Waive Tuition Differential Uses	
(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))	
N/A	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
<p>1. Department of Writing and Rhetoric: \$1,121,000 Continuing support for the Department of Writing and Rhetoric (DWR), whose mission is to coordinate and support a comprehensive vertical writing curriculum at UCF. This program will serve as a flagship vertical writing program and as a national model for how a large public university can act on best practices and research about writing. It will also support a Writing Across the Curriculum program, along with innovative new writing degrees and certificates staffed with full-time composition instructors. We believe this initiative will distinguish UCF regionally and nationally.</p>	<p>The university created a Department of Writing and Rhetoric (DWR) in 2010 to design and support a new writing curriculum while also offering more writing services through the University Writing Center (UWC). Searches for two tenured faculty members were conducted successfully in 2010-11 to direct the UWC and the university's writing across the curriculum (WAC) program. In addition, three tenure-earning faculty, six instructors, two advisors, and an admissions specialist were hired in 2011-12. Searches for one tenure-earning faculty and two instructors were conducted for positions beginning in Fall 2012. Two Faculty Fellows programs for the WAC program were established and attracted two dozen participants from five colleges and one regional campus. In addition, an undergraduate certificate in public and professional writing and a writing minor were implemented in Fall 2011. Currently, there are 46 students in the undergraduate minor.</p>
<p>2. Pre-professional Advising Office: \$250,000 Continue support for the Office of Pre-Professional Advising (OPPA) that was established to: a) provide guidance and support to students interested in pursuing careers in the health and legal professions; and b) assist pre-professional students in any undergraduate major by offering academic advising, administrative support, and other activities related to preparing for, and applying, to professional schools.</p>	<p>Differential tuition for the Office of Pre-professional Advising supported the following undergraduate student activities and services in 2011-12: a) more than 1,400 students were served through their student professional organizations, b) 1,920 in-office advising consultations occurred with students interested in the legal profession and in 12 health professions, c) more than 1,500 students participated in workshops and presentations sponsored by various UCF and external entities, d) representatives from 26 law and health professional schools addressed students, e) advising consultations were assessed, g) participants engaged in numerous campus-wide advising showcase events; and h) relationships were built with law school and health professional school admissions representatives.</p>
<p>3. Undergraduate Education Enhancement Initiatives: \$1,034,133 – Recurring 2009-10 initiative Continue support for the English and math class size initiative to provide more individualized instruction and enhance student success in these general education courses, as well as other subsequent courses, and increase overall retention; and maintain the operating hours of the University Writing Center (UWC) and the Mathematical Assistance and Learning Lab (MALL) and the overall number and quality of</p>	<p>The English Initiative supported updated curriculum, smaller class sizes, and increased use of the University Writing Center (UWC). Differential tuition funds continue to support six instructors affiliated with the English Initiative who taught 1,052 students and participated in the third year of a three-year assessment project to study class-size and teacher-training effects. Funds for the English initiative also allowed additional tutors to be hired in the UWC. These tutors provided 4,935 consultations to help undergraduate students improve their writing skills.</p>



<p>student consultations.</p>	<p>The Math Initiative supported a pilot section of mixed-mode College Trigonometry in Spring 2011 with this section continuing in 2011-12. Beginning in Spring 2013, all sections of College Trigonometry will be offered in the new format. Three sections of the new Calculus I format were offered in Fall 2011. Starting from Spring 2012, all sections of (non-honors) Calculus I were offered in the redesigned mode. Changes for 2011-12 resulted in 79 added sections in the MALL over 2010-11, with a total impact of 7,089 students. Preliminary evidence indicates that the goals that were set by this redesign were met.</p>
<p>4. Enhance Academic Advising Support: \$792,000 Recurring 2009-10 initiative. Continue support for the academic advising program for First Time in College (FTIC) students, second-year sophomores, and transfer students to enable transition into colleges through dedicated advisors.</p>	<p>Concluding its third year, the Academic Advising Enhancement Program (AAEP) continues to support 18 advisors. These advisors identified at-risk populations and implemented interventions to help students avoid academic probation. Innovations included modification of the transfer orientation to expand advising sessions, along with extensive use of technology to help instructors connect with students via live video chats, web courses, and online presentations. All colleges developed new presentations for transfer orientation that focused on how to address transfer shock, how to build a successful first-semester schedule of courses, and how to access campus resources. In addition, a sophomore-week web course was developed.</p>
<p>5. Undergraduate Student Support: \$13,757,598 Continue support for colleges to maintain or increase undergraduate course offerings, hire and support faculty members teaching undergraduate courses, and undertake other initiatives that will directly enhance the overall undergraduate experience and improve retention and graduation rates.</p>	<p>Differential tuition funds enabled colleges to hire and maintain faculty members and adjuncts who taught an estimated 127 additional course sections and continued instruction for 1,606 course sections.</p> <p>Other selected examples of funded initiatives include the following: The College of Business Administration Undergraduate Student Services continued several initiatives to assist new and returning students, such as the development of the nationally recognized "COBA Pass" system, which has reduced waiting time for advising while increasing advising options; the creation of a website for CBA orientation sessions, which has streamlined the orientation process; and the development of a system to identify students who are performing below satisfactory and alert them to the need to seek additional advising. CBA has also started work on an undergraduate mentoring system to improve retention rates.</p> <p>The College of Arts and Humanities used the differential tuition to hire and retain over 25 tenure-earning faculty members and non-tenure earning instructors to teach undergraduate courses to more than 4,800 students. These faculty members are addressing the needs of undergraduate education in specific areas such as Spanish, American History, Creative Writing, and Philosophy. Other faculty members were hired for the newly formed School of Visual</p>



	Arts and Design that currently has more than 1,700 undergraduate majors.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	23 hired, 187 retained
Total Number of Advisors Hired or Retained (funded by tuition differential):	1 hired, 28 retained
Total Number of Course Sections Added or Saved (funded by tuition differential):	127 added, 1,606 retained
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Thirty percent of differential tuition funds collected will be used to help reduce the financial debt of those degree-seeking undergraduates who demonstrate financial need as evidenced by the results of the Free Application for Federal Student Aid (FAFSA)	The tuition differential revenue allowed UCF to increase the number of students receiving the award (from 5,610 in 2010-11 to 6,745 in 2011-12, a 20.2 percent increase) and increase the average award (from \$555 in 2010-11 to \$939 in 2011-12, a 69.2 percent increase).
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	6,745
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$939
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$300
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,200



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

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

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	209	393
Advisors	29	39
Staff	10	14
Total FTE Positions:	248	446
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 24,221,045	44,057,092
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 24,221,045	\$ 44,057,092
<u>Expenditures</u>		
Salaries & Benefits	\$ 16,236,532	\$ 29,899,964
Other Personal Services	364,478	544,000
Expenses	298,747	296,000
Operating Capital Outlay	54,974	100,000
Student Financial Assistance	7,266,314	13,217,127
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ 24,221,045	\$ 44,057,092
Ending Balance Available:	\$ 0	\$ 0

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	8.41	\$15.88	\$24.96	\$44.20	\$66.32	\$91.76	\$121.02
Total Base Tuition & Differential per Credit Hour	\$97.00	\$111.55	\$128.28	\$147.52	\$169.64	\$195.08	\$224.34
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$8.76	\$10.33	\$10.33
Activity & Service	\$10.64	\$10.79	\$10.79	\$10.79	\$11.32	\$11.88	\$12.47
Health	\$8.99	\$9.52	\$9.88	\$10.30	\$10.81	\$11.35	\$11.91
Athletic	\$12.68	\$12.98	\$13.10	\$13.44	\$14.11	\$14.81	\$15.55
Transportation Access	\$7.94	\$8.19	\$9.00	\$9.10	\$9.55	\$10.02	\$10.52
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$53.85	\$55.80	\$57.85	\$60.71	\$64.87	\$68.71	\$71.10
Total Tuition and Fees per Credit Hour	\$150.85	\$167.35	\$186.13	\$208.23	\$234.51	\$263.79	\$295.44
% Change		10.9%	11.2%	11.9%	12.6%	12.5%	12.0%
Fees (block per term):							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$2,910.00	\$3,346.50	\$3,848.40	\$4,425.60	\$5,089.20	\$5,852.40	\$6,730.20
Total Fees for 30 Credit Hours	\$1,615.50	\$1,674.00	\$1,735.50	\$1,821.30	\$1,946.10	\$2,061.30	\$2,133.00
Total Tuition and Fees for 30 Credit Hours	\$4,525.50	\$5,020.50	\$5,583.90	\$6,246.90	\$7,035.30	\$7,913.70	\$8,863.20
\$ Change		\$495.00	\$563.40	\$663.00	\$788.40	\$878.40	\$949.50
% Change		10.9%	11.2%	11.9%	12.6%	12.5%	12.0%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$491.41	\$491.41	\$491.41	\$511.06	\$531.50	\$552.76	\$574.87
Out-of-State Undergraduate Student Financial Aid ³	\$24.57	\$24.57	\$24.57	\$25.55	\$26.57	\$27.63	\$28.74
Total per credit hour	\$515.98	\$515.98	\$515.98	\$536.61	\$558.07	\$580.39	\$603.61
% Change		0.0%	0.0%	4.0%	4.0%	4.0%	4.0%
Total Tuition for 30 Credit Hours	\$2,910.00	\$3,346.50	\$3,848.40	\$4,425.60	\$5,089.20	\$5,852.40	\$6,730.20
Total Fees for 30 Credit Hours	\$17,094.90	\$17,153.40	\$17,214.90	\$17,919.60	\$18,688.20	\$19,473.00	\$20,241.30
Total Tuition and Fees for 30 Credit Hours	\$20,004.90	\$20,499.90	\$21,063.30	\$22,345.20	\$23,777.40	\$25,325.40	\$26,971.50
\$ Change		\$495.00	\$563.40	\$1,281.90	\$1,432.20	\$1,548.00	\$1,646.10
% Change		2.5%	2.7%	6.1%	6.4%	6.5%	6.5%
Housing/Dining⁴	\$8,538.00	\$8,765.00	\$9,063.00	\$9,276.00	\$9,554.00	\$9,841.00	\$10,136.00
\$ Change	\$0.00	\$227.00	\$298.00	\$213.00	\$278.00	\$287.00	\$295.00
% Change		2.7%	3.4%	2.4%	3.0%	3.0%	3.0%
¹ can be no more than 5% of tuition. ³ can be no more than 5% of tuition and the out-of-state fee.							
² capped in statute. ⁴ combine the most popular housing and dining plans provided to students							



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	13%	24,519	52%	23,767	47%	23,873	46%	24,136	45%
FTIC (Profile Admit)	-22%	201	0%	228	0%	225	0%	224	0%
AA Transfers*	61%	17,240	36%	21,161	42%	22,206	42%	23,258	43%
Other Transfers	6%	5,345	12%	5,881	12%	6,126	12%	6,397	12%
Subtotal	26%	47,395	100%	51,037	100%	52,429	100%	54,014	100%
GRADUATE STUDENTS									
Master's	29%	6,131	77%	6,027	76%	6,036	76%	6,083	76%
Research Doctoral	9%	1,644	21%	1,680	21%	1,677	21%	1,697	21%
Professional Doctoral	n/a	156	2%	235	3%	239	3%	237	3%
Subtotal	27%	7,931	100%	7,942	100%	7,952	100%	8,017	100%
NOT-DEGREE SEEKING	-20%	911		859		850		845	
MEDICAL	n/a	100		280		360		420	
TOTAL	25%	56,337		60,118		61,591		63,296	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	195%	7,686	24%	9,304	27%	10,127	28%	10,927	29%
HYBRID (50%-79%)	91%	1,904	6%	2,201	6%	2,465	7%	2,770	7%
TRADITIONAL (<50%)	4%	22,662	70%	23,404	67%	23,835	65%	24,628	64%
TOTAL	27%	32,251	100%	34,909	100%	36,426	100%	38,325	100%
GRADUATE									
DISTANCE (80%)	123%	1,262	29%	1,238	29%	1,281	30%	1,302	30%
HYBRID (50%-79%)	55%	400	9%	479	11%	516	12%	556	13%
TRADITIONAL (<50%)	-3%	2,652	62%	2,522	60%	2,458	58%	2,434	57%
TOTAL	21%	4,314	100%	4,239	100%	4,255	100%	4,292	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	10,306	11,555	10,306	11,454	11,609	11,932	12,920	2.3%
UPPER DIVISION	16,000	21,078	16,000	22,436	23,760	25,285	29,152	6.7%
GRAD I	2,327	2,967	2,327	2,981	2,992	3,081	3,168	1.3%
GRAD II	379	558	379	561	563	568	596	1.3%
TOTAL	29,012	36,157	29,012	37,433	38,924	40,803	45,408	4.7%
Not a Florida Resident								
LOWER DIVISION		470		466	473	486	526	2.3%
UPPER DIVISION		519		552	585	622	718	6.7%
GRAD I		307		309	310	313	328	1.3%
GRAD II		386		388	390	393	413	1.3%
TOTAL	1,528	1,683	1,528	1,716	1,757	1,814	1,984	2.5%
TOTAL								
LOWER DIVISION		12,025		11,921	12,082	12,418	13,446	2.3%
UPPER DIVISION		21,597		22,989	24,345	25,907	29,870	6.7%
GRAD I		3,274		3,290	3,302	3,331	3,496	1.3%
GRAD II		945		949	953	961	1,009	1.3%
TOTAL	30,540	37,841	30,540	39,148	40,681	42,617	47,820	4.8%
TOTAL (US FTE)		47,653		49,290	51,207	53,629	60,152	

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	160	135	240	211	272	317	362	21.8%
NON-RESIDENT	20	44	40	69	88	103	118	21.8%
TOTAL	180	179	280	280	360	420	480	21.8%
Dentistry Headcounts								
FLORIDA RESIDENT	xxx	xxx	xxx	xxx	xxx	xxx	xxx	%
NON-RESIDENT	xx	xx	xx	xx	xx	xx	xx	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	%
Veterinary Headcounts								
FLORIDA RESIDENT	xxx	xxx	xxx	xxx	xxx	xxx	xxx	%
NON-RESIDENT	xx	xx	xx	xx	xx	xx	xx	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Women's Studies	05.0207	-	FIU, UF, USF-T	N	34	Jul-2012
Photonics	14.1003	STEM	-	N	-	Mar-2013
Biomedical Engineering	14.0501	STEM	FGCU, FIU	N	-	Mar-2013
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Cognitive Sciences and Cognitive Disorders	30.2501	STEM	-	N	-	Mar-2013
Public History	54.0405	-	-	N	-	Mar-2013
Arts Management	50.1099	ECON	-	N	-	Mar-2013
DOCTORAL PROGRAMS						
Hospitality Management	52.0901	ECON	-	N	24	Mar-2012
Communication Sciences and Disorders	51.0204	HLTH	FSU, UF, USF-T	N	-	Mar-2013
Criminal Justice	43.0104	SECU	FSU	N	-	Mar-2013

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Communication and Conflict	30.2801	-	-	N	-	Mar-2014
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Public Health	51.2201	HLTH	FAMU, FIU, FSU, UF, USF-T, UWF	Y	-	Jul-2013
Biomedical Engineering	14.0501	STEM	FAMU, FAU, FIU, FSU, UF, USF-T	N	-	Mar-2014
DOCTORAL PROGRAMS						
Biomedical Engineering	14.0501	STEM	FAMU, FIU, FSU, UF, USF-T	N	-	Mar-2015
Public Health	51.2201	HLTH	FAMU, FIU, UF, USF-T	N	-	Mar-2015



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

UF

2012-13 Work Plan



University of Florida

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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MISSION STATEMENT (What is your purpose?)

UF is a public land-grant, sea-grant and space-grant research university and encompasses virtually all academic and professional disciplines. It is a member of the Association of American Universities. Its faculty and staff are dedicated to the common pursuit of the university's threefold mission: **teaching** at the undergraduate and graduate levels; **research and scholarship** integral to the educational process and the expansion of our understanding of the natural world; and **service** that reflects the university's obligation to share the benefits of its research and knowledge for the public good. The university serves the nation's and the state's critical needs by contributing to a well-qualified and broadly diverse citizenry, leadership, and workforce.

VISION STATEMENT (What do you aspire to?)

UF aspires to become a top-ten public research university by: enhancing the quality of undergraduate education; meeting the state's workforce needs through advanced professional degrees; attracting the finest student minds in the world for doctoral research and training; attracting and retaining a world-class faculty to engage students and to pursue vigorous externally funded research programs leading to new discoveries and inventions; building on UF's excellent national ranking in technology transfer and licensing to spur new businesses and state economic development; providing service and outreach to the citizens of Florida. UF seeks to effectively leverage its resources in a transparent and accountable manner to provide the maximum return on investment to the state.

STATEMENT OF STRATEGY (How will you get there?)

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

UF occupies the top niche within the State and competes with the top twenty public universities in the nation for student and faculty talent. To rise into the top ten, UF needs to assume a leadership position in a strategically selected subset of disciplines and endeavors. This requires careful selection of areas of emphasis and targeted investment in those areas to strengthen student recruitment, faculty recruitment and retention, and research programs and capabilities. These thrusts need to be supported by vigorous outreach and public relations efforts, tech transfer and licensing, and economic development initiatives. The university is diversifying its revenue sources to support these endeavors. It will devote 2012-13 to the development of a comprehensive preeminence plan to detail this strategy.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

There are few universities with UF's array of disciplines on one campus, and many are of high quality with outstanding faculty and extensive infrastructure. Consequently, UF is positioned to tackle large multidisciplinary projects such as Aging, Emerging Pathogens, and Nanotechnology. UF has a rapidly growing distance education enterprise, which is a unique asset to provide access in the State and which offers UF a non-state revenue source. UF is poised to become a top ten university, but needs to carefully invest the resources it has and needs to find new resources to complete the journey. The challenge to this program is the current dearth of resources available to invest into it.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

- 1 **Plan for PreEminence.** UF will design and implement an initiative that will improve UF's standing among public research universities as a direct consequence of achieving greater impact in its teaching and job placement programs, its research programs and accompanying licensing, business spinoffs and economic development activities, and its outreach and service programs. It will require strategic investment in carefully selected areas of emphasis, including student and faculty recruitment and retention, graduate student compensation, building of research capacity, tech transfer, and economic development. Some of the resources needed for this plan will be liberated through increased operational efficiencies, notably in shared services.
- 2 **Innovation Square.** UF will fully develop its Innovation Square project that includes:
 - (1) the Innovation Square Properties – a 40 acre urban master plan for a research and innovation community that already contains UF's Innovation Hub, a catalyst for startup companies
 - (2) the Innovation Academy – a cohort of 2,000 students attending UF in the spring and summer terms who enroll in one of 25 majors in an academic environment rich in entrepreneurship, innovation, and creativity
 - (3) the Innovation Dormitory – a public-private partnership to create a living-learning environment for student entrepreneurs to develop and run new business ventures
- 3 **Meeting the State's Needs in STEM.** UF is already the State's major producer of STEM graduates at the undergraduate, professional master's and doctoral levels. UF will implement incentives to increase production of STEM graduates through targeted investment into undergraduate STEM programs and greater guidance to students selecting undergraduate majors. UF will continue to expand its masters and doctoral programs in STEM areas both on campus and through distance education. The Career Resource Center will partner with Workforce Florida to improve placement of graduating students.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
UF is engaged in a comprehensive review of all doctoral programs to determine how best to improve them. UF will design and implement a plan for preeminence – see the paragraph under Key Initiatives and Investments.					
Avg. SAT Score	2.1%	1993	1958	1975	2000
Avg. High School GPA (on 4.0 scale)	.02%	4.3	4.3	4.3	4.4
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	11	11	11	11
Exams Below National/State Benchmark	n/a	0	0	0	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	2	0	1	2	
Operational Efficiency					
Freshman Retention Rate	1%	95%	95%	96%	96%
FTIC Graduation Rates					
In 4 years (or less)	10%	64.8%	65%	65%	66%
In 6 years (or less)	4%	83.5	84%	84%	85%
AA Transfer Graduation Rates					
In 2 years (or less)	11%	49.3%	43%	43%	44%
In 4 years (or less)	5%	82.6%	83%	83%	84%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff are currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	5	3	1	4	
Return on Investment					
Bachelor's Degrees Awarded	5.9%	8,900	8,900	8,900	8,900
Percent of Bachelor's Degrees in STEM	3.0%	27.9%	27.7%	28.4%	29.7%
Graduate Degrees Awarded	28.2%	6,049	6,049	6,049	6,049
Percent of Graduate Degrees in STEM	4.2%	32.2%	33.7%	34.7%	36.7%
Percent of Baccalaureate Graduates Employed in Florida	-12.0%	41%	38%	40%	43%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	0.0%	25%	25%	25%	25%
Annual Gifts Received (\$M)	28.4%	\$201.03	\$210.58	\$216.83	\$229.32
Endowment (\$M)	30.0%	\$1,295.31	\$1,237.26	\$1,249.63	\$1,274.75
SUBTOTAL OF IMPROVING METRICS	6	2	5	5	
TOTAL OF IMPROVING METRICS	13	5	7	11	

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	-4.3%	22	23	24	24
National Academy Members	4.2%	25	26	26	27
Number of Post-Doctoral Appointees	4.0%	625	635	642	656
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	8	8	8	8
SUBTOTAL OF IMPROVING METRICS	2		3	2	2
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	14%	\$682	\$740	\$777	\$815
Science & Engineering Research Expenditures (\$M)	13%	\$636	\$686	\$720	\$756
Percent of Research Expenditures funded from External Sources	55%	49%	49%	49%	49%
Patents Issued	43%	110	88	113	132
Licenses/Options Executed	77%	131	119	125	127
Licensing Income Received (\$M)	-48%	25.1	26	26	26
Number of Start-up Companies	0%	9	13	14	16
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	16.4%	\$507,876	\$532,764	\$550,141	\$584,895
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	NR-FR	n/a	n/a	n/a
Research Doctoral Degrees Awarded	7.8%	775	775	775	775
Professional Doctoral Degrees Awarded	33.4%	1,353	1,353	1,353	1,353
SUBTOTAL OF IMPROVING METRICS	8		5	6	5
TOTAL OF IMPROVING METRICS	10		8	8	7



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Bachelor's Degrees in Areas of Strategic Emphasis	17.8%	3,867	4,006	4,145	4,423
Graduate Degrees in Areas of Strategic Emphasis	33.5%	3,384	3,418	3,452	3,521
*Percentage of Eligible Programs with Specialized Accreditation	*0%	93%	94%	94%	95%

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

Goal 1. As UF develops its Plan for PreEminence (see Key Initiatives and Investments section above), it may add additional narrative and metric goals appropriate for the Plan.

Metric	%Δ	x	x	x	x
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Goal 2. Text here.

Metric	%Δ	x	x	x	x
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*Trend from 2008 to 2011



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 414.8	\$ 384.9	\$ 351.1	\$ 359.9	\$ 286.0	\$ 237.1
Tuition	\$ 181.1	\$ 196.5	\$ 214.2	\$ 243.4	\$ 265.0	n/a
TOTAL MAIN OPERATIONS	\$ 595.9	\$ 581.4	\$ 565.3	\$ 603.3	\$ 551.0	
Education & General – Health-Science Center / Medical Schools						
State Funds	\$ 98.4	\$ 97.3	\$ 104.0	\$ 110.8	\$ 101.8	\$ 93.0
Tuition	\$ 22.9	\$ 27.1	\$ 29.5	\$ 31.8	\$ 35.3	n/a
TOTAL HSC	\$ 121.3	\$ 124.4	\$ 133.5	\$ 142.6	\$ 137.1	
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	\$140.6	\$130.6	\$131.8	\$132.5	\$132.9	\$136.0
Tuition	\$ 00.0	\$ 00.0	\$ 00.0	\$ 00.0	\$ 00.0	\$ 00.0
TOTAL IFAS	\$140.6	\$130.6	\$131.8	\$132.5	\$132.9	\$136.0
EDUCATION & GENERAL TOTAL REVENUES	\$857.8	\$836.4	\$830.6	\$878.4	\$821.0	

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$332.6	\$332.0	\$319.3	\$319.3	\$316.7	n/a
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Contracts & Grants

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

Revenues	\$812.0	\$1,116.3	\$982.1	\$1,045.4	\$1,143.8	n/a
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Local Funds

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

Revenues	\$495.8	\$505.5	\$523.1	\$559.7	\$521.5	n/a
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Faculty Practice Plans

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

Revenues	\$517.0	\$537.4	\$573.5	\$609.9	\$626.8	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$2,157.4	\$2,491.2	\$2,398.0	\$2,534.3	\$2,608.8	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$3,015.2	\$3,327.6	3,228.6	\$3,412.7	\$3,429.8	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$660	\$960	\$	\$	\$
Percent Increase	15%	15%	%	%	%
Required Fees¹	\$1,514	\$1,597	\$	\$	\$
TOTAL TUITION AND FEES	\$5,044	\$5,657	\$	\$	\$

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	41%	41%	40%	39%	40%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$15,318	\$15,932	\$16,013	\$16,841	\$17,669
Student Loan Cohort Default Rate (2nd Year)	2.1%	1.5%	1.9%	2.6%	n/a
Student Loan Cohort Default Rate (3rd Year)	2.9%	2.4%	3.5%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,700	\$1,070	\$8,800	\$530	\$3,730	\$19,830
AT HOME	\$5,700	\$1,070	\$1,480	\$530	\$3,730	\$12,510

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	8,363	29.71%	\$10,394	(\$4,320)	\$10,020	\$3,009
\$40,000-\$59,999	2,943	10.46%	\$13,693	(\$667)	\$6,367	\$3,143
\$60,000-\$79,999	2,676	9.51%	\$14,934	\$1,198	\$4,502	\$3,120
\$80,000-\$99,999	2,496	8.87%	\$14,868	\$1,498	\$4,202	\$3,035
\$100,000 Above	10,784	38.31%	\$14,561	\$1,357	\$4,343	\$1,489
Missing	885	3.14%	\$11,633	\$2,422	\$3,278	\$188
TOTAL	28,147	100%	AVERAGE \$10,869	\$248	\$5,452	\$2,331

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 8, 2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	Applies to all university undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$32.00
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	
\$ Increase in tuition differential per credit hour:	
\$ Increase in tuition differential for 30 credit hours:	
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	
Total differential fee revenue generated in 2012-13 (projected):	
Intended Uses	
The revenue will be used to fund the salaries and benefits of instructors teaching undergraduate courses and of advisors who assist undergraduate students. UF intends to maintain its critical tracking policy, which ensures that students always have timely access to seats in critical tracking courses needed to make progress to graduation.	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
Request to Modify or Waive Tuition Differential Uses	
(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))	
UF requests a waiver of the 70%/30% intended uses criteria identified in Regulation 7.001(14). UF will meet the financial needs of resident undergraduates who apply by the financial aid deadline. UF increased its need-based financial aid by more than 30% of differential tuition in 2011-12.	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Fund faculty/instructors to provide instruction and improve student-faculty ratio	Since the implementation of the Differential Tuition, a total of 96 faculty and 109 temporary faculty have been hired or retained. We continue to advertise for additional faculty from commitments made from these funds. There are currently five positions being advertised.
Fund advisors to provide student advising.	Since the implementation of the Differential Tuition, a total of three advisors have been hired.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	96
Total Number of Advisors Hired or Retained (funded by tuition differential):	3
Total Number of Course Sections Added or Saved (funded by tuition differential):	559
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Need-based grants for undergraduate students with financial need.	Funds were awarded as need-based grants in the Florida Opportunity Scholars Program to Florida resident, first-generation -in-college, undergraduate students, with total family income generally less than \$40,000 per year.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	1,372
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$4,177
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$79
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$9,734



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

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

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	96.00	96.00
Advisors	2.00	2.00
Staff	1.00	1.00
Total FTE Positions:	99.00	99.00
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ 2,242,181	\$ 4,903,101
Less: Prior-Year Encumbrances		
Beginning Balance Available:	\$ 2,242,181	\$ 4,903,101
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 18,728,074	\$
Interest Revenue - Current Year		
Interest Revenue - From Carryforward Balance		
Total Receipts / Revenues:	\$ 18,728,074	\$
<u>Expenditures</u>		
Salaries & Benefits	\$ 9,875,732	\$ 25,731,212
Other Personal Services		
Expenses		
Operating Capital Outlay		
Student Financial Assistance	5,618,422	5,618,422
Expended From Carryforward Balance	573,000	3,336,000
**Other Category Expenditures		
Total Expenditures:	\$ 16,067,154	\$ 34,685,634
Ending Balance Available:	\$ 4,903,101	\$

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University:							
<u>Undergraduate Students</u>	Actual			Projected			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
<u>Tuition:</u>							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	13.74	\$22.00	\$32.00				
Total Base Tuition & Differential per Credit Hour	\$102.33	\$117.67	\$135.32				
% Change		15.0%	15.0%				
<u>Fees (per credit hour):</u>							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16				
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76				
Activity & Service	\$10.65	\$13.94	\$14.55				
Health	\$10.49	\$12.99	\$13.82				
Athletic	\$1.90	\$1.90	\$1.90				
Transportation Access	\$6.79	\$7.33	\$7.88				
Technology ¹	\$4.42	\$4.78	\$5.16				
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$43.43	\$50.48	\$53.23				
Total Tuition and Fees per Credit Hour	\$145.76	\$168.15	\$188.55				
% Change		15.4%	12.1%				
<u>Fees (block per term):</u>							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60				
Total Fees for 30 Credit Hours	\$1,302.90	\$1,514.40	\$1,596.90				
Total Tuition and Fees for 30 Credit Hours	\$4,372.80	\$5,044.50	\$5,656.50				
\$ Change		\$671.70	\$612.00				
% Change		15.4%	12.1%				
<u>Out-of-State Fees</u>							
Out-of-State Undergraduate Fee	\$614.97	\$707.21	\$707.21	\$707.21	\$707.21	\$707.21	\$707.21
Out-of-State Undergraduate Student Financial Aid ³	\$30.74	\$35.36	\$35.36	\$35.36	\$35.36	\$35.36	\$35.36
Total per credit hour	\$645.71	\$742.57	\$742.57	\$742.57	\$742.57	\$742.57	\$742.57
% Change		15.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60				
Total Fees for 30 Credit Hours	\$20,674.20	\$23,791.50	\$23,874.00				
Total Tuition and Fees for 30 Credit Hours	\$23,744.10	\$27,321.60	\$27,933.60				
\$ Change		\$3,577.50	\$612.00				
% Change		15.1%	2.2%				
<u>Housing/Dining⁴</u>	\$7,500.00	\$8,640.00	\$8,800.00	\$9,196.00	\$9,794.00	\$10,382.00	\$10,849.00
\$ Change	\$0.00	\$1,140.00	\$160.00	\$396.00	\$598.00	\$588.00	\$467.00
% Change		15.2%	1.9%	4.5%	6.5%	6.0%	4.5%

¹ can be no more than 5% of tuition.³ can be no more than 5% of tuition and the out-of-state fee.² capped in statute.⁴ combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	-4.3%	25,885	51.7%	26,280	52.3%	26,620	52.4%	26,960	52.6%
FTIC (Profile Admit)									
AA Transfers*	-8.0%	5,311	10.6%	5,333	10.6%	5,333	10.5%	5,333	10.4%
Other Transfers	-40.8%	868	1.7%	735	1.5%	735	1.4%	735	1.4%
Subtotal	-6.5%	32,064	64.0%	32,348	64.4%	32,688	64.4%	33,028	64.4%
GRADUATE STUDENTS									
Master's	27.3%	7,279	14.5%	7,328	14.6%	7,428	14.6%	7,528	14.7%
Research Doctoral	1.6%	4,597	9.2%	4,562	9.1%	4,612	9.1%	4,662	9.1%
Professional Doctoral	7.1%	3,431	6.8%	3,309	6.6%	3,334	6.6%	3,359	6.5%
Subtotal	13.8%	15,307	30.5%	15,199	30.2%	15,374	30.3%	15,549	30.3%
NOT-DEGREE SEEKING	-6.7%	1,523		1,505		1,505		1,505	
MEDICAL	6.6%	1,212		1,215		1,215		1,215	
TOTAL	-0.8%	50,106		50,267		50,782		51,297	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	70.1%	2,704	11.3%	3,450	14.2%	3,910	16.1%	4,600	19.0%
HYBRID (50%-79%)	427.7%	654	2.7%	1,380	5.7%	2,300	9.5%	3,450	14.2%
TRADITIONAL (<50%)	-20.9%	20,489	85.9%	19,392	80.1%	18,037	74.4%	16,209	66.8%
TOTAL	1.7%	23,846	100.0%	24,222	100.0%	24,247	100.0	24,259	100.0%
GRADUATE									
DISTANCE (80%)	63.2%	348	3.7%	477	5.0%	537	5.6%	568	5.9%
HYBRID (50%-79%)	403.7%	188	2.0%	477	5.0%	758	7.9%	947	9.8%
TRADITIONAL (<50%)	-8.2%	8,889	94.3%	8,545	90.0%	8,340	86.6%	8,161	84.3%
TOTAL	2.7%	9,425	100.0%	9,499	100.0%	9,635	100.0	9,676	100.0%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	10,182	9,813	10,182	10,182	10,182	10,182	10,182	0.7%
UPPER DIVISION	13,258	13,152	13,258	13,258	13,258	13,258	13,258	0.2%
GRAD I	3,824	2,325	2,798	2,798	2,798	2,798	2,798	3.8%
GRAD II	2,933	3,769	3,521	3,521	3,521	3,521	3,521	-1.4%
TOTAL	30,197	29,058	29,759	29,759	29,759	29,759	29,759	0.5%
Not a Florida Resident								
LOWER DIVISION		334		346	346	347	347	0.8%
UPPER DIVISION		401		436	461	472	472	3.3%
GRAD I		1,244		1,244	1,251	1,259	1,263	0.3%
GRAD II		1,875		1,936	2,065	2,098	2,070	2.0%
TOTAL	4,049	3,854	4,049	3,962	4,123	4,176	4,153	1.5%
TOTAL								
LOWER DIVISION	10,182	10,147	10,182	10,528	10,528	10,529	10,529	0.7%
UPPER DIVISION	13,258	13,553	13,258	13,694	13,719	13,730	13,730	0.3%
GRAD I	3,824	3,569	2,798	4,042	4,049	4,057	4,061	2.6%
GRAD II	2,933	5,643	3,521	5,457	5,586	5,619	5,591	-0.2%
TOTAL	34,246	32,912	33,808	33,721	33,882	33,935	33,912	0.6%
TOTAL (US FTE)								

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	513	536	513	513	513	513	513	-0.9%
NON-RESIDENT		10		27	27	27	27	22.0%
TOTAL	513	546	513	540	540	540	540	-0.2%
Dentistry Headcounts								
FLORIDA RESIDENT	321	318	321	321	321	321	321	0.2%
NON-RESIDENT		13		10	10	10	10	-5.1%
TOTAL	321	331	321	331	331	331	331	0.0%
Veterinary Headcounts								
FLORIDA RESIDENT	332	346	332	344	344	344	344	-0.1%
NON-RESIDENT		1		0	0	0	0	-100.0%
TOTAL	332	347	332	344	344	344	344	-0.2%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRAT EGIC EMPHA SIS	OTHER UNIVERSITIE S WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
African American Studies	05.0201	No	FAMU, USF, FSU	N	46	06-12
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Health Science – Environment & Global Health	51.2202	Health	None	Some	40	06-12
Sustainable Construction	04.0902	No	None	N		06-13
DOCTORAL PROGRAMS						

New Programs To Be Considered by University in 2013-15 for Implementation

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



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 minus table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

UNF

2012-13 Work Plan



University of North Florida

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of North Florida fosters the intellectual and cultural growth and civic awareness of its students, preparing them to make significant contributions to their communities in the region and beyond. At UNF, students and faculty engage together and individually in the discovery and application of knowledge. UNF faculty and staff maintain an unreserved commitment to student success within a diverse, supportive campus culture.

VISION STATEMENT (What do you aspire to?)

The University of North Florida aspires to be a preeminent public institution of higher learning that will serve the North Florida region at a level of national quality. The institution of choice for a diverse and talented student body, UNF will provide distinctive programs in the arts and sciences and professional fields. UNF faculty will excel in teaching and scholarship, sharing with students their passion for discovery. Students, faculty, staff, alumni, and visitors will enjoy a campus noteworthy for its communal spirit, cultural richness, and environmental beauty.

STATEMENT OF STRATEGY (How will you get there?)

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

UNF is a regional university dedicated to providing intellectual, cultural, and civic capital for the betterment of Northeast Florida and indeed the entire State. **The market of UNF is determined by the size of its service region; the socioeconomic and geographic characteristics of the region; the extensive range of public and private collaborations that exist throughout the region; and the composition of the region's higher educational resources.** Specifically, the following features characterize UNF's market:

- A diverse metropolitan population in excess of 1 million residents with a projection of steady growth into the future.
- A large population of freshmen and AA transfer students along with a graduate population of approximately 13%.
- A complex economy whose main drivers are the State's second largest health care industry; shipping, trade, and logistics resulting from Jacksonville's prominence as an international port and transportation center; and a large technology-intensive corporate sector.
- A unique physical environment (the region is coastal, estuarine, and bisected by a major river).



- A strong relationship between the university and its many public and private partners throughout the region consistent with the university's commitment to serve as a "steward of place."
- A complementary relationship with the local state college that allows UNF to focus on high profile undergraduates and masters and doctoral degree programs appropriate to the needs of the region.

UNF has developed a number of strategies for addressing the needs of its market now and in the future, including expansion, enhancement, and collaboration.

- **EXPANSION**

UNF's master plan calls for growth up to and perhaps exceeding 25,000 students synchronized to the growth of its physical plant, faculty size, and the expansion of distance learning as an effective means of educational advancement.

- **ENHANCEMENT**

Beginning fall 2012, UNF will require on-campus housing for freshmen. Effort will now be focused on developing a robust First Year Experience program and on further enriching the undergraduate learning experience towards the goal of improving retention and graduation rates.

UNF has developed particular strength in areas that correspond to major regional economic drivers including health care, transportation, and financial services. It will seek to enhance each of these areas through a strategic allocation of new resources and a deliberate reallocation of existing resources, multidisciplinary collaboration, and the pursuit of external support in the form of contracts and grants and endowments.

While supported by strong STEM programs in chemistry, physics, and mathematics, capitalizing on its location, UNF is developing especially distinctive programs in coastal science and engineering. The university has targeted these areas for further enhancement through the allocation of new and existing resources and through increasingly successful pursuit of research and funding opportunities in these areas.

- **COLLABORATION**

UNF contributes to and benefits from extensive partnerships across the region. Prominent examples of these links include the partnerships with the Duval County Public School system focused on urban education; the partnerships between the Brooks College of Health and every major regional health care provider, focused on clinical training and health care administration; the deep ties between the Coggin College of Business and regional for-profit businesses and industries, especially those related to transportation and logistics; and the growing relationships between the College of Computing, Engineering, and Construction with public and private enterprises requiring expertise in applied research and information technology. The depth and strength of UNF's ties to the community are confirmed by the success of two \$100 million dollar plus capital campaigns conducted within the past fifteen years.

UNF partnered with the other educational institutions in the City to develop the Jacksonville Commitment Program that provides guaranteed financial support for eligible high school students. UNF has maintained a cooperative relationship with FSCJ to avoid program duplication and to provide educational opportunities to the full range of students from the North Florida region. As FSCJ provides access at the freshman level and to an increasing number of baccalaureate programs, UNF has been increasingly able to focus on meeting the needs of highly qualified undergraduates and career-oriented graduate students.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

UNF offers its undergraduate students a singular educational experience. By virtue of its smaller size UNF is able to provide a communal atmosphere that is optimal for students who enjoy and benefit from a more intimate learning environment than they would experience at most other institutions in the SUS. Required on-campus freshman housing, an integrated First Year Experience program, smaller classes both at the lower and upper levels, and TLOs, all serve to maximize opportunities for students to work and study directly with faculty who are committed to student learning as their highest priority. The challenge UNF faces will be to preserve this environment in the face of reduced resources and the pressure on every institution to increase efficiency in degree production.

UNF already offers constellations of programs in niche-specific areas that coincide with areas of regional economic prominence, specifically health care and biomedical science; and commerce. The university aspires to strengthen these areas through increasing both the depth and breadth of existing and emergent academic programs.

Another such area is coastal science that is driven as much by the region's geography as by economic opportunity. UNF has a noteworthy program in Coastal Biology and newly developed prowess in the area of Coastal Engineering supported by the Taylor Engineering Research Institute. As resources permit it will add cognate programs in coastal geology and port engineering.

The numerous collaborations outlined in the preceding section constitute another strength of the university. As the region's exclusive public university, UNF plays a unique role in advancing the quality of life in the greater metropolitan area. Approximately, 70% of UNF's 65,000 graduates live and work in the region, more than the number of UF and FSU graduates combined, confirming how critical UNF is to regional workforce development. As UNF becomes more sharply focused on job creation, it will seek to further integrate theoretical university-based and "authentic" on-site learning to help make the transition between study and employment as seamless as possible.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. Enriched undergraduate learning. While UNF is committed to offering strong and relevant master's and doctoral graduate programs, the great majority of UNF's students are undergraduates and quality undergraduate education grounded on a liberal arts core will always remain among the highest institutional priorities. To that end, in addition to implementing required on-campus living for freshmen and a robust First Year Experience program, UNF also has adopted National Center for Academic Transformation (NCAT) strategies to transform gatekeeper into gateway courses; developed UNF Writes, an initiative led by the Department of English to embed writing across the curriculum; and perhaps most importantly, UNF has established an extensive program of Transformational Learning Opportunities (TLOs) which has quickly become a hallmark of the UNF educational experience. TLOs are available to all students, many of whom receive support to facilitate their participation. While the TLO program provides a broad spectrum of opportunities to students, in one of its aspects it has been extended under the aegis of the university's commitment to community engagement to form



the basis of UNF's SACS Quality Enhancement Plan, the theme of which is Community-Based Transformational Learning. Over the next three years the university will also focus TLOs on internships and undergraduate research in order to improve their readiness for transition to professional or graduate careers. This initiative has a direct bearing on **Academic Quality** (as it clearly impacts student learning) and **Return on Investment** (as students will be better prepared for entry into the workforce).

2. Constellations of excellence and relevance. UNF will seek to advance existing program strengths in areas that correspond to significant regional economic activity or environmental distinction: health care and biomedical science; commerce; and coastal science. It will pursue advancement through the allocation of strategic positions (as one case in point, our coastal programs in engineering and biology would both benefit from the addition of a coastal geologist), and through capitalizing on opportunities for synergy (again, as a case in point, the Coggin College of Business is developing a Center for Sustainable Business Practices that will draw on the expertise from across our university and community). This initiative will contribute to **Academic Quality** through enhancement of the breadth and depth of academic programs, and to **Return on Investment**, since these constellations are all in areas that directly impact the regional economy and quality of life.

3. Distance Learning. In response to student demand and faculty interest, UNF is embracing opportunities made available through new technologies to complement its traditional course offerings. UNF only chose to implement a DL fee beginning in fall, 2011. Having done so, it now has a predictable revenue stream that will enable UNF to develop the infrastructure necessary to support an expansion of distance learning courses and programs. Such expansion will be critical to meeting demand for distance and hybrid learning opportunities, and to expanding access to current and future UNF students both locally and further afield. This initiative contributes to **Academic Quality** (by virtue of its impact on student learning); **Return on Investment** (by virtue of its contribution to student retention and progress toward degree completion); and **Operational Efficiency** (by maximizing classroom utilization and technological resources).



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
Strategic reinvestment of funding such as targeted allocation of flagship monies, transfer of faculty lines from lower priority programs to higher priority "constellation" programs (commerce, healthcare & health administration, coastal studies), and institutional initiatives such as Freshmen Year Experience and NCAT redesign efforts to improve critical metrics which contribute to accountability reports and rankings in publications such as Princeton Review, Forbes, US News.					
Avg. SAT Score	1.1%	1,204	1,208	1,215	1,220
Avg. High School GPA (on 4.0 scale)	5.2%	3.79	3.84	3.87	3.90
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	0%	1	1	2	2
Exams Below National/State Benchmark	n/a	1	1	0	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	2	2	4	4	4
Operational Efficiency					
Freshman Retention Rate	1.3%	81%	82%	83%	85%
FTIC Graduation Rates					
In 4 years (or less)	-1.0%	20%	21%	22%	24%
In 6 years (or less)	4.5%	49%	50%	51%	53%
AA Transfer Graduation Rates					
In 2 years (or less)	0%	32%	33%	34%	36%
In 4 years (or less)	-2.7%	63%	64%	65%	67%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	2	5	5	5	5
Return on Investment					
Bachelor's Degrees Awarded	27%	2,992	3,142	3,299	3,637
Percent of Bachelor's Degrees in STEM	1.5%	14%	15%	16%	18%
Graduate Degrees Awarded	16%	595	613	631	670
Percent of Graduate Degrees in STEM	1.4%	5%	5%	6%	6%
Percent of Baccalaureate Graduates Employed in Florida	-5.0%	n/a	71%	72%	73%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	7.7%	14%	15%	15%	15%
Annual Gifts Received (\$M)	-32.7%	10.9	8.0	9.0	10.0
Endowment (\$M)	-12.8%	77.4	77.0	80.0	90.0
SUBTOTAL OF IMPROVING METRICS	5	4	7	6	6
TOTAL OF IMPROVING METRICS	9	11	16	15	15

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric #1: Percent of Course Sections Offered via Distance and Blended Learning	3.4%	5.2%	6.6%	8.2%	12%
Metric #2: Bachelor's Degrees in Areas of Strategic Emphasis	28%	1,001	1,049	1,101	1,206
Metric #3: Freshman in Top 10% of Graduating High School Class	-1%	22%	27%	28%	30%

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

Goal 1. Consistent with its adoption of mandatory freshmen housing and a robust Freshmen Year Experience program, UNF is intent upon improving average time to degree of its Full time In College (FTIC) cohorts

Metric: Average Time to Degree for FTICs	5%	4.6	4.5	4.4	4.2
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Goal 2. Seek and/or Maintain and strengthen Carnegie's Community Engagement Classification as evidenced by increased numbers of students involved in internships.

Metric 2.1: Percentage of Upper Division Undergraduates Participating in Internships	0%	16%	15%	16%	18%
Metric 2.2: Number of Upper Division Undergraduates Participating in Internships	13%	1,772	1,765	1,809	1,854



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Estimated	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$90.9	\$84.5	\$80.4	\$82.5	\$71.2	\$66.0
Tuition & Fees	\$39.7	\$40.3	\$48.0	\$53.0	\$56.7	n/a
TOTAL MAIN OPERATIONS	\$130.5	\$124.8	\$128.4	\$135.6	\$127.9	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	\$0	\$0	\$0	\$0	\$0	\$0
Tuition	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL HSC	\$0	\$0	\$0	\$0	\$0	\$0
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	\$0	\$0	\$0	\$0	\$0	\$0
Tuition	\$0	\$0	\$0	\$0	\$0	\$0
TOTAL IFAS	\$0	\$0	\$0	\$0	\$0	\$0
EDUCATION & GENERAL TOTAL REVENUES	\$ 130.5	\$ 124.8	\$ 128.4	\$ 135.6	\$ 127.9	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$32.7	\$34.2	\$37.1	\$38.5	\$39.8	n/a
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Contracts & Grants

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

Revenues	\$13.0	\$10.8	\$12.3	\$13.7	\$11.9	n/a
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Local Funds

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

Revenues	\$42.4	\$43.6	\$52.3	\$60.0	\$61.1	n/a
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Faculty Practice Plans

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

Revenues	\$0	\$0	\$0	\$0	\$0	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$88.1	\$88.6	\$101.7	\$112.1	\$112.8	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$218.6	\$213.4	\$230.2	\$247.7	\$240.7	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870.10	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
Tuition Differential Fee	\$384.00	\$642.60	\$1,203.90	\$1,849.43	\$2,591.78
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,657.50	\$1,884.60	\$2,006.40	\$2,127.24	\$2,251.12
TOTAL TUITION AND FEES	\$4,911.60	\$5,626.80	\$6,309.90	\$7,076.27	\$7,942.50

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	42%	42%	40%	43%	41%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$14,595	\$15,365	\$15,608	\$16,572	\$16,069
Student Loan Cohort Default Rate (2nd Year)	4.2%	3.6%	5.6%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	6.7%	6.8%	8.3%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,580	\$1,000	\$8,452	\$1,629	\$2,349	\$19,010
AT HOME	\$5,580	\$1,000	\$4,144	\$1,629	\$2,349	\$14,702

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	2,212	33%	\$9,929	\$(3,379)	\$8,412	\$4,383
\$40,000-\$59,999	803	12%	\$12,084	\$(1,034)	\$6,030	\$3,428
\$60,000-\$79,999	701	11%	\$14,657	\$1,527	\$3,400	\$3,931
\$80,000-\$99,999	694	11%	\$14,866	\$1,894	\$3,071	\$3,302
\$100,000 Above	2,013	32%	\$15,576	\$2,239	\$2,671	\$2,607
Missing	85	1%	\$14,881	\$1,788	\$3,090	\$772
TOTAL	6,508	100%	AVERAGE \$12,807	\$(194)	\$5,163	\$3,505

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	March 20, 2012
Implementation Date (month/year):	August, 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University of North Florida campus
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$5,507,596
Total differential fee revenue generated in 2012-13 (projected):	\$10,016,245
Intended Uses	
<p>Describe how the revenue will be used.</p> <p>The funds will be used to (a) maintain 49 lines covered in 2011-2012, (b) fund 58 new and continuing faculty positions, and (c) provide need-based financial aid for 900 or more students. Funding the faculty lines is imperative to offering a full course schedule for current and new students.</p>	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>Without the 58 lines, 348 class sections would need to be canceled for next year's schedule and we would be unable to meet the needs of over 870 full time students.</p>	
Request to Modify or Waive Tuition Differential Uses (this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Maintain lines funded through prior tuition differential funds and additional funding.	48 positions were funded from tuition differential increase
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	48
Total Number of Advisors Hired or Retained (funded by tuition differential):	
Total Number of Course Sections Added or Saved (funded by tuition differential):	288
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Jacksonville Commitment	\$808,726 were expended in need-based aid for students from Duval County
General university-funded need-based aid	\$561,175 were expended on general need-based aid programs
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	412 students received aid through these funds
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	The mean per-student allocation was \$3,325
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	The smallest award given was \$456. This students also received other funds
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	The maximum award given was \$7,500. This student also received other funds.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES, & AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

STATE UNIVERSITY SYSTEM OF FLORIDA Tuition Differential Collections, Expenditures, and Available Balances University: University of North Florida Fiscal Year 2011-12 and 2012-13		
University Tuition Differential Budget Entity: 48900100 (Educational & General) SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
FTE Positions:	48.00	107.00
Faculty		
Advisors		
Staff		
Total FTE Positions:	48.00	107.00
Balance Forward from Prior Periods		
Balance Forward	\$ (114,203)	\$ 827,053
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ (114,203)	\$ 827,053
Receipts / Revenues		
Tuition Differential Collections	\$ 5,507,596	10,016,245
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 5,507,596	\$ 10,016,245
Expenditures		
Salaries & Benefits	\$ 3,196,439	\$ 7,011,372
Other Personal Services	-	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	1,369,901	3,004,874
Expended From Carryforward Balance	-	827,053
**Other Category Expenditures	-	-
Total Expenditures:	\$ 4,566,340	\$ 10,843,298
Ending Balance Available:	\$ 827,053	\$ -
*Since the 2011-12 year has not been completed, provide an estimated actual.		
**Provide details for "Other Categories" used.		



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University: University of North Florida

<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
<u>Tuition:</u>							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	5.74	\$12.80	\$21.42	\$40.13	\$61.65	\$86.39	\$114.85
Total Base Tuition & Differential per Credit Hour	\$94.33	\$108.47	\$124.74	\$143.45	\$164.97	\$189.71	\$218.17
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
<u>Fees (per credit hour):</u>							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$8.76	\$10.76	\$12.76
Activity & Service	\$12.89	\$13.34	\$14.24	\$14.47	\$15.19	\$15.95	\$16.75
Health	\$6.17	\$9.51	\$9.51	\$9.76	\$10.25	\$10.76	\$11.30
Athletic	\$13.36	\$14.23	\$14.98	\$16.33	\$17.15	\$18.00	\$18.90
Transportation Access	\$3.85	\$3.85	\$3.85	\$4.08	\$4.08	\$4.08	\$4.08
Technology ¹	\$0.00	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)			\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$45.45	\$55.25	\$62.82	\$66.88	\$70.91	\$75.04	\$79.27
Total Tuition and Fees per Credit Hour	\$139.78	\$163.72	\$187.56	\$210.33	\$235.88	\$264.75	\$297.44
% Change		17.1%	14.6%	12.1%	12.1%	12.2%	12.3%
<u>Fees (block per term):</u>							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change							
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,949.03	\$5,691.38	\$6,545.09
Total Fees for 30 Credit Hours	\$1,363.50	\$1,657.50	\$1,884.60	\$2,006.40	\$2,127.24	\$2,251.12	\$2,378.20
Total Tuition and Fees for 30 Credit Hours	\$4,193.40	\$4,911.60	\$5,626.80	\$6,309.90	\$7,076.27	\$7,942.50	\$8,923.28
\$ Change		\$718.20	\$715.20	\$683.10	\$766.37	\$866.24	\$980.78
% Change		17.1%	14.6%	12.1%	12.1%	12.2%	12.3%
<u>Out-of-State Fees</u>							
Out-of-State Undergraduate Fee	\$425.02	\$425.02	\$425.02	\$459.02	\$495.74	\$535.40	\$578.23
Out-of-State Undergraduate Student Financial Aid ³	\$21.25	\$21.26	\$21.26	\$22.95	\$24.79	\$26.77	\$28.91
Total per credit hour	\$446.27	\$446.28	\$446.28	\$481.97	\$520.53	\$562.17	\$607.14
% Change		0.0%	0.0%	8.0%	8.0%	8.0%	8.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.20	\$4,303.50	\$4,949.03	\$5,691.38	\$6,545.09
Total Fees for 30 Credit Hours	\$14,751.63	\$15,045.90	\$15,273.00	\$16,465.53	\$17,743.10	\$19,116.25	\$20,592.54
Total Tuition and Fees for 30 Credit Hours	\$17,581.53	\$18,300.00	\$19,015.20	\$20,769.03	\$22,692.13	\$24,807.63	\$27,137.62
\$ Change		\$718.47	\$715.20	\$1,753.83	\$1,923.10	\$2,115.50	\$2,329.99
% Change		4.1%	3.9%	9.2%	9.3%	9.3%	9.4%
<u>Housing/Dining⁴</u>							
	\$7,872.00	\$8,293.00	\$8,732.53	\$8,994.51	\$9,264.34	\$9,542.27	\$9,828.54
\$ Change	\$0.00	\$421.00	\$439.53	\$261.98	\$269.84	\$277.93	\$286.27
% Change		5.3%	5.3%	3.0%	3.0%	3.0%	3.0%

¹ can be no more than 5% of tuition.³ can be no more than 5% of tuition and the out-of-state fee.² capped in statute.⁴ combine the most popular housing and dining plans provided to students



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2011-12 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	-18%	1,888	40%	1,788	37%	1,888	36%	1,988	35%
FTIC (Profile Admit)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
AA Transfers*	24%	1,518	32%	1,670	34%	1,837	34%	2,020	35%
Other Transfers	-22%	1,303	28%	1,433	29%	1,577	30%	1,734	30%
Subtotal	-11%	4,709	100%	4,891	100%	5,302	100%	5,742	100%
GRADUATE STUDENTS									
Master's	-18%	606	94%	606	94%	636	94%	668	94%
Research Doctoral	-14%	10	2%	10	2%	11	2%	11	2%
Professional Doctoral	-22%	29	4%	29	4%	30	4%	32	4%
Subtotal	-14%	645	100%	645	100%	677	100%	711	100%
NOT-DEGREE SEEKING	-6%	237		237		249		261	
MEDICAL	n/a	n/a		n/a		n/a		n/a	
TOTAL	-11%	5,591		5,773		6,228		6,714	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2011-12		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	155%	560	6%	581	6%	657	7%	736	7%
HYBRID (50%-79%)	461%	98	1%	103	1%	124	1%	147	2%
TRADITIONAL (<50%)	4%	8,812	93%	8,978	93%	9,074	92%	9,168	91%
TOTAL	7%	9,470	100%	9,662	100%	9,855	100%	10,051	100%
GRADUATE									
DISTANCE (80%)	740%	88	9%	95	10%	107	11%	120	12%
HYBRID (50%-79%)	388%	61	6%	63	7%	76	8%	76	8%
TRADITIONAL (<50%)	3%	819	85%	781	83%	789	81%	797	80%
TOTAL	17%	968	100%	939	100%	972	100%	993	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Actual 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
<i>Florida Resident</i>								
LOWER DIVISION	3,530	3,612	3,530	3,433	3,485	3,537	3,644	1.50%
UPPER DIVISION	5,244	5,620	5,244	5,936	6,084	6,236	6,552	2.50%
GRAD I	851	782	851	806	822	838	872	2.00%
GRAD II	125	131	125	129	132	134	164	4.96%
TOTAL	9,750	10,145	9,750	10,304	10,522	10,746	11,232	2.16%
<i>Not a Florida Resident</i>								
LOWER DIVISION	90	105	90	100	101	103	106	1.50%
UPPER DIVISION	104	114	104	120	123	126	133	2.50%
GRAD I	51	68	51	70	71	73	76	2.00%
GRAD II	5	6	5	6	6	6	8	4.96%
TOTAL	250	293	250	296	302	308	322	2.10%
<i>TOTAL</i>								
LOWER DIVISION	3,620	3,717	3,620	3,533	3,586	3,640	3,750	1.50%
UPPER DIVISION	5,348	5,734	5,348	6,056	6,207	6,363	6,685	2.50%
GRAD I	902	850	902	876	894	911	948	2.00%
GRAD II	130	137	130	135	138	140	172	4.96%
TOTAL	10,000	10,438	10,000	10,600	10,825	11,054	11,555	2.16%
TOTAL (US FTE)	13,333	13,917	13,333	14,133	14,433	14,739	15,406	2.16%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Social Work	44.0701		FAMU, FAU, FGCU, FIU, FSU, UCF, USF T, UWF	No	54 FTE	Oct. 2012
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
ASL/English Interpreting	16.1603		None		41.8 FTE	Jan. 2013
DOCTORAL PROGRAMS						
Clinical Nutrition	51.3102		None		TBD	Jan. 2013

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Environmental Management	03.0103		FGCU, FIU	No	TBD	TBD
International Affairs	45.0901		FIU, FSU, UF	No	TBD	TBD
Social Work	44.0701		FAMU, FAU, FGCU, FIU, FSU, UCF, USF T, UWF	Yes (FSU)	TBD	TBD
DOCTORAL PROGRAMS						



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

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USF System

2012-13
Work Plan



University of South Florida - System

Work Plan Presentation for 2012-13 Board of Governors Review

PENDING USF SYSTEM BOT APPROVAL

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

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INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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1. STRATEGY

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

2. KEY PERFORMANCE INDICATORS

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

3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of South Florida System, which includes USF Tampa, USF St. Petersburg, and USF Sarasota-Manatee, catalyzes and coordinates initiatives at and among its interdependent institutions that develop graduates for 21st century careers; advances research, scholarship, and creative endeavors to improve the quality of life; and engages its communities for mutual benefit.

VISION STATEMENT (What do you aspire to?)

The University of South Florida System will empower and connect its institutions into a distinctive system that is nationally recognized for innovation in teaching and research, for attracting outstanding and diverse scholars, staff and students, and for transforming its region and beyond.

STATEMENT OF STRATEGY (How will you get there?)

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

The USF System is comprised of an RU/VH institution (Tampa) that is moving towards AAU eligibility, and two premier comprehensive master's institutions that provide distinctive academic programs serving the Tampa Bay community and focused particularly on the specific needs within their respective communities. The member institutions measure success through a combination of internal and external measures, setting clear annual targets for a series of metrics and comparisons with peer and aspirational peer institutions. The USF System uses national benchmarks to monitor: broad measures of academic institutions through the Integrated Postsecondary Education Data System (IPEDS); USF's position in the top tier of American research universities through the Carnegie Foundation for the Advancement of Teaching; community engagement through the designation of two of its member institutions as a *Community Engaged University*; performance indices through the Association of American Universities (AAU); ranking of research universities through the National Science Foundation (NSF); ranking of the scope and quality of graduate programs through the National Research Council (NRC); ranking by the annual report of the Top American Research Universities (TARU); annual rankings in US News and World Report (USNWR); technology transfers, start-ups and patents through the Association of University Technology Managers (AUTM); endowment standings through the National Association of Colleges and University Business Officers (NACUBO); statistics on international education and study abroad through the Institute of International Education/Open Doors (IIE). Specific statements of strategy for each member institution of the USF System can be found in their respective work plans.

STRENGTHS AND OPPORTUNITIES (within 3 years)

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

The USF System's core capabilities include: diversity and access; excellence in teaching and learning; high impact scholarship, research and creative activities; student success; shared governance; workforce and economic development; entrepreneurial spirit, partnerships and innovation; uniquely focused, high quality academic programs; global research, community engagement and public service. The challenge will be to maintain institutional quality, increase educational and research productivity, and enhance revenue under dwindling state resources. Specific strengths and opportunities for each member institution of the USF System can be found on their respective work plans.



KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1 Academic Excellence, Student Access and Student Success: The USF System will (a) provide first-class, comprehensive educational programs and student research opportunities to foster critical thinking and intellectual inquiry; (b) enhance opportunities for students by providing transformational learning that is intellectually, scientifically and technologically sound and produces relevant, applied skills and engaged outcomes including an increased commitment to STEM and health fields; (c) graduate competitive, highly skilled students ready to enter the workforce; and (d) educate competitive, highly-skilled students ready to enter the workforce.

2 Impactful Research, Economic Leadership, and Community Engagement: The USF System will: (a) engage in high impact research, scholarship and creative activities that generate new knowledge; (b) increase research opportunities for students; (c) develop strategic interdisciplinary research initiatives across System institutions that solve critical problems; (d) promote community engaged scholarship and creative activities to benefit all members of society; and (e) increase recruitment of distinguished senior faculty at regional institutions .

3 Expanded and Diversified Resources: The USF System will: (a) demonstrate financial security via a sustainable economic base in all business practices; (b) pursue entrepreneurial endeavors that augment revenue and maximize institutional effectiveness; (c) establish mutually beneficial partnerships (internal and external) that enhance student access to academic programs, research and employment opportunities, including collaborative degree programs that build on the strengths of the member institutions; (d) increase lower division opportunities at regional institutions; and (e) provide stewardship that represents the cornerstone of economic and cultural significance for the community.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10- 11)	2010-11 ACTUAL	2011-12 ESTIMATE S	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
The USF System will (a) Engage in high impact student success research; (b) Establish partnerships to enhance student access to academic programs and research; (c) Educate competitive, highly-skilled (STEM) students ready to enter the workforce; (d) Continue to develop nationally ranked programs at all institutions.					
Avg. SAT Score	-1% ¹	1133	1150	1155	1165
Avg. High School GPA (on 4.0 scale)	5%	3.67	3.76	3.78	3.82
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	3	3	4	4
Exams Below National/State Benchmark	n/a	2	2	1	1
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	1		2	3	2
Operational Efficiency					
Freshman Retention Rate	5%	87.6%	88%	89%	90%
FTIC Graduation Rates					
In 4 years (or less)	14%	34.7%	35%	36%	38%
In 6 years (or less)	6%	51.6%	52%	54%	56%
AA Transfer Graduation Rates					
In 2 years (or less)	0%	29.6%	30%	30.5%	31.5%
In 4 years (or less)	4%	65.7%	66%	68%	70%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	4		6	6	6
Return on Investment					
Bachelor's Degrees Awarded	32%	8287	8699	8750	8850
Percent of Bachelor's Degrees in STEM	%	20%	20.5%	20.5%	21%
Graduate Degrees Awarded	26%	2992	3090	3125	3250
Percent of Graduate Degrees in STEM	2%	21%	21%	21%	21.5%
Percent of Baccalaureate Graduates Employed in Florida	-7%	n/a	65%	65%	65%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	-1%	n/a	18%	18%	20%
Annual Gifts Received (\$M)	76%	\$81.5	\$47.2	\$51.9	\$62.8
Endowment (\$M)	4%	\$344.6	\$347.0	\$375.0	\$437.0
SUBTOTAL OF IMPROVING METRICS	5		4	4	7
TOTAL OF IMPROVING METRICS	10		12	13	15

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	20%	6 est	10	12	14
National Academy Members	50%	3	3	4	5
Number of Post-Doctoral Appointees	64%	293	310	312	320
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	5	5	5	6
SUBTOTAL OF IMPROVING METRICS	3		2	3	4
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	31%	\$ 400.7	\$ 422.0	\$ 443.0	\$ 465.0
Science & Engineering Research Expenditures (\$M)	20%	\$ 343.0	\$ 360.2	\$ 378.2	\$ 397.1
Percent of Research Expenditures funded from External Sources	1%	77.33%	81.20%	85.26%	89.52%
Patents Issued	279%	91	84	67	50
Licenses/Options Executed	71%	36	37	40	48
Licensing Income Received (\$M)	-24%	\$ 1.3	\$ 1.3	\$ 2.5	\$ 2.75
Number of Start-up Companies	33%	8	5	7	8
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	24%	\$136.0	\$142.8	\$149.9	\$157.4
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	USNWR rankings are not done for the USF System			
Research Doctoral Degrees Awarded	44%	267	277	283	340
Professional Doctoral Degrees Awarded	68%	156	156	158	165
SUBTOTAL OF IMPROVING METRICS	9		6	9	9
TOTAL OF IMPROVING METRICS	12		8	12	13

Notes: (1) the most recent faculty Awards data is based on 2009-10 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Graduate Degrees in Areas of Strategic Emphasis	28%	1300	1362	1380	1456
Bachelor's Degree in Areas of Strategic Emphasis	41%	3184	3244	3406	3755
Percent of Course Sections Offered via Distance and Blended Learning	5%	11.5%	12.4%	13%	14%

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

Goal 1. With a strategic goal of engaging in impactful research, the USF System will continue to build a sustainable research infrastructure, including total research expenditures as defined by the National Science Foundation.

Total Research Expenditures	31%	\$400.7	\$422	\$443	\$465
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Goal 2. With a strategic goal of engaging in impactful research, the USF System will continue to build a sustainable research infrastructure, including federal research expenditures as defined by the National Science Foundation.

Federal Research Expenditures	59%	\$ 245.4	\$ 257.7	\$ 270.6	\$ 284.1
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OPERATIONS

Draft



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 307.5	\$ 288.7	\$ 269.5	\$ 291.9	\$ 249.2	\$ 178.5*
Tuition	\$ 109.7	\$ 115.0	\$ 126.3	\$ 143.7	\$ 163.2	n/a
TOTAL MAIN OPERATIONS	\$ 417.2	\$ 403.7	\$ 395.8	\$ 435.6	\$ 412.4	\$ 178.5*
Education & General – Health-Science Center / Medical Schools						
State Funds	\$66.7	\$ 62.8	\$ 66.6	\$ 68.3	\$ 64.8	\$65.2*
Tuition	\$ 22.6	\$ 26.3	\$ 30.0	\$ 32.9	\$ 34.5	n/a
TOTAL HSC	\$ 89.3	\$ 89.1	\$ 96.6	\$ 101.2	\$ 99.3	\$65.2*
EDUCATION & GENERAL TOTAL REVENUES	\$ 506.5	\$ 492.8	\$ 492.4	\$ 536.8	\$ 511.7	\$ 243.7*

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

*Per SB1994, the 2012-13 appropriations state funds amount includes the \$10M funding amount and \$6M for Pharmacy

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$ 163.1	\$ 171.4	\$ 142.8	\$ 159.3	\$ 165.0	n/a
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Contracts & Grants

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

Revenues	\$ 260.4	\$ 346.3	\$ 296.9	\$ 280.7	\$ 243.8	n/a
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Local Funds

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

Revenues	\$ 145.7	\$ 135.1	\$ 408.5	\$ 442.4	\$ 382.6	n/a
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Faculty Practice Plans

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

Revenues	\$ 174.9	\$ 150.2	\$ 174.7	\$ 183.6	\$ 185.4 est	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 744.1	\$ 802.9	\$ 1022.9	\$ 1065.9	\$ 976.8	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 1250.6	\$ 1295.7	\$ 1515.4	\$ 1602.7	\$ 1488.5	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition					
Tuition Differential Fee					
Percent Increase					
Required Fees ¹					
TOTAL TUITION AND FEES					

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

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	53%	52%	51%	53%	53%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$18,517	\$19,963	\$21,679	\$22,077	\$22,500
Student Loan Cohort Default Rate (2nd Year)	4.9%	6.3%	7.0%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	n/a	n/a	10.1%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,800	\$1,500	\$9,190	\$1,600	\$2,500	\$20,590
AT HOME	\$5,800	\$1,500	\$4,590	\$1,600	\$2,500	\$15,990

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES		AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT	
	HEADCOUNT	PERCENT					
Below \$40,000	7,756	38%	\$11,621	-\$2,863	\$8,177	\$4,349	
\$40,000-\$59,999	2,580	13%	\$13,879	-\$308	\$5,705	\$4,099	
\$60,000-\$79,999	2,015	10%	\$15,744	\$1,803	\$3,656	\$4,284	
\$80,000-\$99,999	1,711	8%	\$16,494	\$2,621	\$2,828	\$4,028	
\$100,000 Above	4,818	24%	\$16,566	\$2,607	\$2,884	\$2,859	
Missing	1,408	7%	\$17,411	\$4,638	\$698	\$200	
TOTAL	20,292	100%	AVERAGE	\$14,306	\$209	\$5,185	\$3,642

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

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

Effective Date	
University Board of Trustees Approval Date:	
Implementation Date (month/year):	
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	
\$ Increase in tuition differential per credit hour:	
\$ Increase in tuition differential for 30 credit hours:	
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$
Total differential fee revenue generated in 2012-13 (projected):	\$
Intended Uses	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
Request to Modify or Waive Tuition Differential Uses	
(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

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

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Improve Baccalaureate retention and graduation	
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	
Total Number of Advisors Hired or Retained (funded by tuition differential):	
Total Number of Course Sections Added or Saved (funded by tuition differential):	
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase the number of students who are awarded grants funded by the tuition differential.	
Increase the average amount of awards in order to partially off-set tuition increases for needy students.	
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	



**FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13**

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

Draft



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

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

Draft



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	4%	17510	48%	17488	48%	17213	48%	16793	48%
FTIC (Profile Admit)	-60%	227	1%	215	1%	221	1%	224	1%
AA Transfers*	27%	11,961	33%	11834	33%	111519	32%	11425	32%
Other Transfers	1%	6,594	18%	6866	19%	6702	19%	6860	19%
Subtotal	9%	36,292	100%	36,403	100%	35,655	100%	35,302	100%
GRADUATE STUDENTS									
Master's	16%	6,522	69%	6589	68%	6753	67%	6915	66%
Research Doctoral	23%	2,289	24%	2425	25%	2600	26%	2750	26%
Professional Doctoral	24%	604	6%	700	7%	750	7%	750	7%
Subtotal	18%	9,415	100%	9,838	100%	10,229	100%	10,543	100%
NOT-DEGREE SEEKING	-5%	2,093		1,910		2,048		2,209	
MEDICAL	18%	473		480		480		480	
TOTAL	10%	48,273		48,507		48,286		48,406	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	%	4743	20%	5127	20%	5365	20%	5620	20%
HYBRID (50%-79%)	%Δ	349	1%	517	2%	627	2%	709	3%
TRADITIONAL (<50%)	%Δ	18723	79%	19552	78%	20395	77%	21281	77%
TOTAL	%Δ	23,815	100%	25,196	100%	26,386	100%	27,610	100%
GRADUATE									
DISTANCE (80%)	%Δ	1066	19%	1117	19%	1173	19%	1235	20%
HYBRID (50%-79%)	%Δ	110	2%	120	2%	135	2%	153	2%
TRADITIONAL (<50%)	%Δ	4314	79%	4502	78%	4710	78%	4921	78%
TOTAL	%Δ	5,490	100%	5,739	100%	6,018	100%	6,309	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	9377	9431	9377	9248	9242	9274	9488	0.6%
UPPER DIVISION	13361	14580	13361	14564	14423	14314	14582	0.03%
GRAD I	3679	3635	3679	3455	3424	3440	3509	0.5%
GRAD II	855	1132	855	969	984	1012	1136	4%
TOTAL	27,272	28,778	27,272	28,226	28,073	28,040	28,715	1%
Not a Florida Resident								
LOWER DIVISION	0.00	397	0.00	574	660	764	1054	16%
UPPER DIVISION	0.00	436	0.00	550	592	638	753	8%
GRAD I	0.00	371	0.00	555	586	624	699	6%
GRAD II	0.00	498	0.00	600	634	659	722	5%
TOTAL	1400	1702	1400	2,278	2,472	2,685	3,229	9%
Total								
LOWER DIVISION	9377	9828	9377	9822	9902	10038	10542	2%
UPPER DIVISION	13361	15016	13361	15114	15015	14952	15335	0.4%
GRAD I	3679	4006	3679	3999	4011	4064	4208	1%
GRAD II	855	1630	855	1569	1617	1671	1859	4%
TOTAL	28,672	30,480	28,672	30,505	30,544	30,725	31,945	1%
TOTAL (US FTE)	38,228	40,639	38,228	40,571	40,624	40,864	42,487	

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts *(FTE does not apply)*

Medicine Headcounts								
FLORIDA RESIDENT	480	445	480	436	432	432	432	-0.18%
NON-RESIDENT	0	32	0	44	48	48	48	1.76%
TOTAL	480	477	480	480	480	480	480	0.00%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered for Implementation *(for 2012-2013) USF System*

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
B.A. Film and New Media Studies (Tampa)	50.0602	No	FSU,UF,UNF,UWF,U CF, UM,FIU,FAU		117	May 2013
B.A. Foreign Languages & Literature (St. Pete)	16.0101	No	UCF	N/Y	65	Aug 2013
B.A. Business & Technical Comm. (SM)	23.1101	No	None	N	100	May 2013

**Program has not completed internal approval process*

***Substitution for B.S. Digital Design & Tech.*

MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Sports & Entertainment Mgt (Tampa)	31.0504	No	FAMU,FAU,FIU,FSU, UCF,UF	N	25	May 2013
Athletic Training (Tampa)	51.0913	No	FIU	N	30	May 2013
Metabolic & Nutritional Medicine (Tampa)	26.9999	STEM	None	N/Y	37.5	May 2013
M.A. Education* (SM)	13.0101	No	UCF, FAU	Y/N	50	Dec 2012

**Program has not completed internal review process*



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 minus table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

USF Sarasota- Manatee 2012-13 Work Plan



University of South Florida Sarasota-Manatee
Work Plan Presentation for 2012-13 Board of Governors Review

PENDING USF SYSTEM BOT APPROVAL

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of South Florida Sarasota-Manatee provides access to professional higher education programs and scholarly research in a personalized living and learning community that graduates successful leaders who empower Florida's Suncoast to thrive locally, nationally, and globally.

VISION STATEMENT (What do you aspire to?)

The University of South Florida Sarasota-Manatee strives to be a hometown comprehensive university with ever-increasing national and global impact.

STATEMENT OF STRATEGY (How will you get there?)

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

In keeping with our separate SACS accreditation, effective January 1, 2011, USF Sarasota-Manatee advances the Access = Success mission, which includes academic programs for lower-level students, including general education. The loss of high school graduates from Sarasota, Manatee, and DeSoto counties to other Florida counties causes a significant brain drain to our region. In 2010-11, the Florida Department of Education reported that 1,576 high school graduates in our three counties reported post-graduation plans to attend a public university in Florida. Other than the small number attending New College, the rest must leave our community to receive a four-year university education. Lower-division programs will enlarge the size of a university-educated work force and improve quality of life in our Suncoast region. USFSM has already begun to test the local demand and the University's ability to meet these needs by offering a few, select lower-level courses as a service to our entering transfer students. These classes have consistently filled and the number of credits hours generated has increased 500% over the past three years, indicating an even greater demand. USFSM plans to continue to address these needs by admitting 100 students for the full bachelor's degree program in Fall Semester 2013. Within the next three years, USFSM does not expect the student credit hours at the lower level to exceed 25% of our total student credit hours.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

USF Sarasota-Manatee is privileged to provide education that permits students to “learn where they earn.” to participate in regional economic development, to link continuing professional training to maintain workforce competence, and to respond to the learning needs of a growing population. As a member of the USF System, USFSM benefits from the efficiency of shared resources, the opportunity for collaboration with other member institutions, and a unified brand that yields identity and impact. Currently, the University’s steepest challenge is the decrease in general revenue funding. The campus will sustain a \$1.3 million cut to its base budget in the upcoming fiscal year.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

- 1. Provide lower-level classes** – USF Sarasota-Manatee plans to add lower-level courses to improve access to four-year degrees for the over 1,500 high school graduates from Sarasota, Manatee, and DeSoto counties. These graduates now must leave the service area to attend other SUS Universities, which have become more competitive in their admissions and unable to accept all who apply. The addition of the full four-year program will be attractive to those with financial challenges, the need to work full-time and first-generation students who often prefer to stay close to their family and community. Within the next three years, USFSM does not expect the student credit hours at the lower level to exceed 25% of our total student credit hours.
- 2. Develop programs based on their positive potential impact on the local community while also serving state and national educational needs** – In alignment with the Board of Governors identified areas of programmatic strategic emphasis, USFSM offers degree-programs in the critical needs areas of information technology and criminology, as well as special education through the Bay-to-Bay consortium. In 2011, USFSM received approval to offer the second bachelor’s in communication sciences and disorders. The University also plans to partner with USF Tampa to host the complementary master’s degree in this area as well. This spring, USFSM forged a partnership with Mote Marine Laboratory to phase in science education housed at the Mote campus and taught by Mote
- 3. Continue to improve baccalaureate retention and graduation rates** – In addition to meeting the USFSM strategic goal of access, as documented in initiatives 1 and 2 above, the University will also strive to improve the success of students. Several initiatives have already been implemented including the use of an early alert system to identify students at risk who are matched with services to assist and support their achievement. USFSM leverages technology to improve student-learning outcomes and uses tuition differential funds to open additional undergraduate course sections, which can improve rates of graduation.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
Describe plans for increasing national preeminence of University and select programs.					
Avg. SAT Score	n/a	n/a	n/a	n/a	1000
Avg. High School GPA (on 4.0 scale)	n/a	n/a	n/a	n/a	3.3
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Exams Below National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
Operational Efficiency					
Freshman Retention Rate	n/a	n/a	n/a	n/a	xx%
FTIC Graduation Rates					
In 4 years (or less)	n/a	n/a	n/a	n/a	xx%
In 6 years (or less)	n/a	n/a	n/a	n/a	xx%
AA Transfer Graduation Rates					
In 2 years (or less)	-2%*	30%	31%	32%	35%
In 4 years (or less)	-4%*	56%	60%	62%	64%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
Return on Investment					
Bachelor's Degrees Awarded	26%	454	494	524	588
Percent of Bachelor's Degrees in STEM	-1%	3%	3%	4%	5%
Graduate Degrees Awarded	-62%*	68	73	70	90
Percent of Graduate Degrees in STEM	n/a	0%	0%	0%	0%
Percent of Baccalaureate Graduates Employed in Florida	%Δ	Data available only at the USF System level			
Percent of Baccalaureate Graduates Continuing their Education (in FL)	%Δ	Data available only at the USF System level			
Annual Gifts Received (\$M)	%Δ	Data available only at the USF System level			
Endowment (\$M)	%Δ	Data available only at the USF System level			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
TOTAL OF IMPROVING METRICS	x	x	x	x	x

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.

*In Fall 2009, USF Tampa mandated that any USFSM student in degree programs hosted by USF Tampa or not offered completely by USFSM be removed from USFSM Home Campus enrollment numbers. As a result of the mandate, USFSM graduation and retention rates were negatively affected.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric 1. Number of Adult (age 25+) Undergraduates Enrolled	1%	888	954	997	1,089
Metric 2. Percent of Course Sections Offered via Distance and Blended Learning	33%	38%	39%	40%	40%
Metric 3. Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)	USFSM will register to receive the Elective Community Engagement Classification between January 2013 and May 2013, the next open registration period. According to the Carnegie Foundation timeline, this would allow for designation in January 2015.				

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

Goal 1. Student Access: *Expand access to University education that benefits students and the local, national, and global community.*

Metric: Citizens Served	42%	4,604	4,507	4,700	5,100
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Goal 2. Student Success: *Enhance success of student outcomes, faculty productivity, and community impact.*

Metric: AA Graduation Rates 4yr	-4%*	56%	60%	62%	64%
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* In Fall 2009, USF Tampa mandated that any USFSM student in degree programs hosted by USF Tampa or not offered completely by USFSM be removed from USFSM Home Campus enrollment numbers. As a result of the mandate, USFSM graduation and retention rates were negatively affected.



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 15.1	\$ 14.1	\$ 13.1	\$ 12.9	\$ 11.2	\$ 10.1
Tuition	\$ 4.2	\$ 4.8	\$ 5.4	\$ 6.3	\$ 6.9	n/a
TOTAL MAIN OPERATIONS	\$ 19.3	\$ 18.9	\$ 18.5	\$ 19.2	\$ 18.1	\$ 10.1
EDUCATION & GENERAL TOTAL REVENUES	\$ 19.3	\$ 18.9	\$ 18.5	\$ 19.2	\$ 18.1	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	Data reported at the USF System level.
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Contracts & Grants

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

Revenues	Data reported at the USF System level.
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Local Funds

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

Revenues	Data reported at the USF System level.
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Faculty Practice Plans

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

Revenues	Data reported at the USF System level.
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OTHER BUDGET ENTITY TOTAL REVENUES	Data reported at the USF System level.
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UNIVERSITY REVENUES GRAND TOTAL	Data reported at the USF System level.
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$384	\$643	\$1,204	\$1,849	\$2,591
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,293	\$1,316	\$1,316	\$1,316	\$1,316
TOTAL TUITION AND FEES	\$4,547	\$5,059	\$5,620	\$6,264	\$7,007

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	n/a	n/a	n/a	n/a	n/a
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	n/a	n/a	n/a	n/a	n/a
Student Loan Cohort Default Rate (2nd Year)	4.9%	6.3%	7.0%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	xx%	xx%	10.1%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,060	\$1,500	\$9,190	\$1,600	\$2,500	\$19,850
AT HOME	\$5,060	\$1,500	\$4,590	\$1,600	\$2,500	\$15,250

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	278	57%	\$12,737	-\$1,970	\$6,459	\$5,683
\$40,000-\$59,999	56	11%	\$14,756	\$922	\$3,593	\$4,337
\$60,000-\$79,999	34	7%	\$15,780	\$2,641	\$2,041	\$4,435
\$80,000-\$99,999	30	6%	\$14,772	\$3,095	\$1,508	\$3,966
\$100,000 Above	42	9%	\$15,207	\$2,824	\$1,750	\$1,954
Missing	50	10%	\$15,226	\$4,613	\$11	\$100
TOTAL	490	100%	AVERAGE \$13,769	\$73	\$4,460	\$4,448

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. Family Income Groups are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. Full-time Students is a headcount based on at least 24 credit hours during Fall and Spring terms. Average Gift Aid includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. Net Cost of Attendance is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. Net Tuition & Fees is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). Average Loan Amount includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line Average represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	6/14/2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	USF Sarasota-Manatee
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All university undergraduate courses.
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$726,037
Total differential fee revenue generated in 2012-13 (projected):	\$1,235,514
Intended Uses	
<p>Cost-efficient utilization of instructional technology and innovation , along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> Technology & Research: Provide supplemental instruction and expanded undergraduate research opportunities through high-impact student success initiatives (e.g., the development of a Science Math and Research Technology SMART Lab, instructional and learning innovation) and distance learning for expanded access. Financial Counseling and Debt Reduction: Mitigate the financial impact of the increasing costs of higher education through focused and proactive financial counseling and debt reduction strategies. Advising: Enhance the current advising model through technology and staffing, with a focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours, and expanding USF's Veterans' Success program. Job Placement –Economic development: Broaden the high skilled workforce and direct economic impact of the university by: expanding STEM and IT programs, strengthening relationships with business and industry, engaging in co-op partnerships, and expanding professional support for job placement through USF's recently expanded Career Center/Job Hub. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>USF System efforts to move away from the traditional delivery model will be significantly impaired or delayed, potentially resulting in stagnant or declining graduation rates and a reduced ability to meet the workforce demands of the state. The loss of potential need-based financial aid (30%) will further reduce student access, retention and graduation rates while likely increasing student indebtedness. USF's commitment to investing in (70%) enhanced instruction and learning (particularly in STEM), serving returning veterans, reducing excess hours and student debt, and job placement for graduates will be diminished or, at best, delayed.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase undergraduate course offerings.	182 course sections were funded partially or fully through the tuition differential.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	87
Total Number of Advisors Hired or Retained (funded by tuition differential):	0
Total Number of Course Sections Added or Saved (funded by tuition differential):	182
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase the number of students who are awarded grants funded by the tuition differential.	We were able to increase the number of students paid by 128, or 93.4%.
Increase the average amount of awards in order to partially off-set tuition increases for needy students.	The average award increased by \$261, which represents an increase of 33.5%.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	265
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1044
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	188
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2500



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	37.26	50
Advisors	0	0
Staff	0	0
Total FTE Positions:	0	0
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$128,077	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$128,077	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$509,477	1,235,514
Interest Revenue - Current Year	875	1,418
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$510,352	\$1,236,932
<u>Expenditures</u>		
Salaries & Benefits	\$ -	\$762,077
Other Personal Services	395,770	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	242,659	474,855
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$638,429	\$1,236,932
Ending Balance Available:	\$ -	\$ -
*Since the 2011-12 year has not been completed, provide an estimated actual.		
**Provide details for "Other Categories" used.		



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University of South Florida - Sarasota-Manatee							
<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% projected legislative increase)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	\$5.74	\$12.80	\$21.42	\$40.13	\$61.64	\$86.38	\$114.83
Total Base Tuition and Differential	\$94.33	\$108.47	\$124.74	\$143.45	\$164.96	\$189.70	\$218.15
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$9.82	\$20.19	\$20.19	\$20.19	\$20.19	\$20.19	\$20.19
Health	\$2.00	\$4.03	\$4.03	\$4.03	\$4.03	\$4.03	\$4.03
Athletic	\$2.10	\$4.23	\$4.23	\$4.23	\$4.23	\$4.23	\$4.23
Transportation Access							
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Sub total (credit hour fees)	\$27.52	\$42.77	\$43.53	\$45.53	\$45.53	\$45.53	\$45.53
Total Tuition and Fees per credit hour	\$121.85	\$151.24	\$168.27	\$188.98	\$210.49	\$235.23	\$263.68
% Change		24.1%	11.3%	12.3%	11.4%	11.8%	12.1%
Fees (block per term):							
Activity & Service							
Health							
Athletic	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
Transportation Access							
Total Block Fees per term	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.31	\$4,303.61	\$4,948.91	\$5,691.11	\$6,544.61
Total Fees for 30 Credit Hours	\$835.60	\$1,293.10	\$1,315.90	\$1,375.90	\$1,375.90	\$1,375.90	\$1,375.90
Total Tuition and Fees for 30 Credit Hours	\$3,665.50	\$4,547.20	\$5,058.21	\$5,679.51	\$6,324.81	\$7,067.01	\$7,920.51
\$ Change		\$881.70	\$511.01	\$621.30	\$645.30	\$742.20	\$853.50
% Change		24.1%	11.2%	12.3%	11.4%	11.7%	12.1%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$343.16	\$343.16	\$291.68	\$315.00	\$315.00	\$315.00	\$315.00
Out-of-State Undergraduate Student Financial Aid ³	\$17.15	\$17.15	\$14.58	\$15.75	\$15.75	\$15.75	\$15.75
Total per credit hour	\$360.31	\$360.31	\$306.26	\$330.75	\$330.75	\$330.75	\$330.75
% Change		0%	-15%	8%	0%	0%	0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.31	\$4,303.61	\$4,948.91	\$5,691.11	\$6,544.61
Total Fees for 30 Credit Hours	\$11,644.90	\$12,102.40	\$10,503.70	\$11,298.40	\$11,298.40	\$11,298.40	\$11,298.40
Total Tuition and Fees for 30 Credit Hours	\$14,474.80	\$15,356.50	\$14,246.01	\$15,602.01	\$16,247.31	\$16,989.51	\$17,843.01
\$ Change		\$881.70	-\$1,110.49	\$1,356.00	\$645.30	\$742.20	\$853.50
% Change		6.1%	-7.2%	9.5%	4.1%	4.6%	5.0%
¹ can be no more than 5% of tuition. ³ can be no more than 5% of tuition and the out-of-state fee.							
² capped in statute.							



ENROLLMENT PLANNING

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	n/a	0	n/a	0	xx%	95	5%	152	8%
FTIC (Profile Admit)	n/a	0	n/a	0	xx%	5	0%	8	0%
AA Transfers*	32%	1,133	74%	1,235	75%	1,291	71%	1,349	69%
Other Transfers	5%	400	26%	418	25%	437	24%	456	23%
Subtotal	24%	1,533	100%	1,653	100%	1,828	100%	1,965	100%
GRADUATE STUDENTS									
Master's	-38%	184	100%	130	100%	136	100%	142	100%
Research Doctoral	-100%	0	0%	0	0%	0	xx%	0	0%
Professional Doctoral	n/a	0	0%	0	0%	0	xx%	0	0%
Subtotal	-39%	184	100%	130	100%	136	100%	142	100%
NOT-DEGREE SEEKING	38%	180		162		169		177	
MEDICAL	n/a	n/a		0		0		0	
TOTAL	14%	1,897		1,945		2,133		2,284	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	283%	467	44%	536	45%	570	45%	615	46%
HYBRID (50%-79%)	%	27	2%	36	3%	38	3%	40	3%
TRADITIONAL (<50%)	-2%	576	54%	619	52%	659	52%	681	51%
TOTAL	51%	1070	100%	1191	100%	1267	100%	1336	100%
GRADUATE									
DISTANCE (80%)	19792%	24	19%	20	18%	21	18%	22	18%
HYBRID (50%-79%)	%Δ	2.5	2%	3	3%	3	3%	6	5%
TRADITIONAL (<50%)	-37%	100.5	79%	87	79%	91	79%	92	77%
TOTAL	-20%	127	100%	110	100%	115	100%	120	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	0	107	0	146	175	195	212	9.1%
UPPER DIVISION	798	957	798	1018	1064	1112	1213	3.8%
GRAD I	182	104	182	105	110	115	125	3.8%
GRAD II	0	1	0	0	0	0	0	%
TOTAL	980	1169	980	1269	1349	1421	1551	4.5%
Not a Florida Resident								
LOWER DIVISION	0	3	0	4	5	5	6	9.1%
UPPER DIVISION	0	21	0	22	23	24	27	3.8%
GRAD I	0	5	0	5	5	5	6	3.8%
GRAD II	0	0	0	0	0	0	0	%
TOTAL	0	30	0	31	33	35	39	4.5%
TOTAL								
LOWER DIVISION	0	110	0	150	180	200	218	9.1%
UPPER DIVISION	798	978	798	1040	1087	1136	1240	3.8%
GRAD I	182	110	182	110	115	120	131	3.8%
GRAD II	0	1	0	0	0	0	0	%
TOTAL	980	1199	980	1300	1382	1456	1590	4.5%
TOTAL (US FTE)	1306	1455	1306	1733	1842	1941	2119	4.5%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT								%
NON-RESIDENT								%
TOTAL								%

N/A



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIE S WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
B.A. in Business & Technical Communication	23.1101	N/A	None	No	100	Oct-12
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
M.A. in Education	13.0101	N/A	UCF, FAU	Y/N	50	Oct-12
DOCTORAL PROGRAMS						

New Programs To Be Considered by University in 2013-15 for Implementation

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



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

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USFSP

2012-13 Work Plan



University of South Florida St. Petersburg

Work Plan Presentation for 2012-13 Board of Governors Review

PENDING USF SYSTEM BOT APPROVAL

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of South Florida St. Petersburg offers distinctive graduate and undergraduate programs in the arts and sciences, business, and education within a close-knit, student-centered learning community that welcomes individuals from the region, state, nation and world. We conduct wide-ranging, collaborative research to meet society's needs and engage in service projects and partnerships to enhance the university and community's social, economic and intellectual life. As an integral and complementary part of a multi-institutional system, USF St. Petersburg retains a separate identity and mission while contributing to and benefiting from the associations, cooperation, and shared resources of a premier national research university.

VISION STATEMENT (What do you aspire too?)

The University of South Florida St. Petersburg will be a premier masters degree level urban university recognized for its vibrant community of scholars who engage and improve its community and the world.

STATEMENT OF STRATEGY (How will you get there?)

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

USFSP's market is driven by its goal to be the masters comprehensive university of choice in the Tampa Bay region and beyond. Recognized by the Carnegie Foundation for the Advancement of Teaching as a community-engaged university, USFSP will continue its strategies of developing distinctive academic programs for both undergraduate and graduate students that reflect community and regional needs, of nurturing vibrant student-faculty interaction, and of providing student-centered support for curricular and co-curricular activities. In addition, it will pursue these strategies through careful financial and environmental stewardship. It will measure its success through a combination of internal and external measures, including student measures of academic performance, increased student degree completion, and measures of civic engagement.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities and opportunities (aka “weaknesses”) for improvement?

USFSP’s core capabilities include excellence in teaching, high levels of faculty-student interaction in research, student success, faculty achievement, entrepreneurial spirit, strong and collaborative community engagement, key partnerships, and high accountability for results. USFSP also provides students with an intimate intellectual environment to facilitate their growth as active learners and instill life-long habits of the mind. USFSP has high potential for growth in enrollment, even as it retains its institutional character of close faculty-student interactions in the classroom, laboratory, and studio. The single largest challenge will be to continue to provide excellence with continuously declining state support (58% reduction since 2007). Academic facilities are also key unmet need.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. Increase the percentage of residential students as a percent of the total student body.

- Currently USFSP houses about 11% of its undergraduate student body in university housing.
- National research shows that increased residential living promotes higher retention, greater student participation in co-curricular activities; and higher graduation rates

To reach this goal, USFSP will open additional residential spaces in 2012 to raise the overall residential student numbers to 15% of the undergraduate student body. USFSP will also increase its focus on the residential experience as a co-curricular activity.

2. Expand graduate and undergraduate academic programs to meet regional need and demand. These programs will be carefully selected to:

- Add value to economic growth and vitality in St. Petersburg and in Pinellas County particularly in the area of new business and small business development
- Meet important future workforce needs
- Assist Pinellas County schools (K-12) in meeting key educational goals

To reach this goal, USFSP will work proactively with its regional stakeholders and with prospective employers to anticipate demand and then develop academic programs to meet that demand.

3. Enhance the number and quality of the established faculty ranks at USFSP. Currently, USFSP has many outstanding developing (pre-tenure) faculty in its ranks. While this sets the stage for a long future of high quality academic programs and scholarly productivity, USFSP has a dearth of established faculty, especially in the full Professor ranks. Recruitment of such individuals in key disciplines will strengthen USFSP’s academic leadership and facilitate the achievement of USFSP’s strategic goals.

To reach this goal, USFSP will focus on highly selective opportunities to recruit outstanding senior faculty in key curricular areas.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND* (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
USFSP achieved national ranking in US News and World Reports (#36 among regional institutions). USFSP is the only Florida institution ranked nationally in business for a focus on corporate and social responsibility. USFSP will seek membership in national honor societies both at the disciplinary and institutional levels.					
Avg. SAT Score	.2%	1,100	1,080	1,100	1,100
Avg. High School GPA (on 4.0 scale)	.0%	3.5	3.5	3.5	3.5
Professional/Licensure Exam First-time Pass Rates					
Exams Above National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Exams Below National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
Operational Efficiency					
Freshman Retention Rate	5%*	71%	72%	73%	75%
FTIC Graduation Rates					
In 4 years (or less)	6%*	21%	27%	32%	42%
In 6 years (or less)	-.03%	29%	30%	32%	35%
AA Transfer Graduation Rates					
In 2 years (or less)	-4%	23%	27%	32%	42%
In 4 years (or less)	7%	59%	59%	60%	62%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
Return on Investment					
Bachelor's Degrees Awarded	9%	705	730	750	750
Percent of Bachelor's Degrees in STEM	14%	7%	7%	10%	15%
Master's Degrees Awarded	20%	144	144	144	144
Percent of Master's Degrees in STEM	7%*	7%	7%	9%	10%
Percent of Baccalaureate Graduates Employed in Florida	n/a	Data reported at the USF System level			
Percent of Baccalaureate Graduates Continuing their Education (in FL)	n/a	Data reported at the USF System level			
Annual Gifts Received (\$M)	n/a	Data reported at the USF System level			
Endowment (\$M)	n/a	Data reported at the USF System level			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
TOTAL OF IMPROVING METRICS	x	x	x	x	x

* Five-yr trends are widely variable on data such as FTICs (new at USFSP) or STEM degrees which are new at USFSP.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric #1 Average time to degree for FTICs	5%	4.3	4.2	4.1	4.0
Metric #2 Pct. of Online/Blended Courses	8%	12%	13%	14%	15%
Metric #3 Maintain Carnegie's Community Engagement	100%*	✓	✓	✓	✓

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

Goal 1. Enhance undergraduate and graduate degree programs (USF System Goals 1 and 3); USFSP will continue to add undergraduate and graduate degree programs in response to regional need and demand; USFSP will improve efficiency of its curriculum in both structure and delivery, especially by exploring opportunities for USF System collaboration and for non-traditional forms of delivery.

Metric: Total annual SCH production	27%	112,672	121,276	122,815	124,657
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Goal 2. Improve baccalaureate retention and graduation (USF System Goal 1); USFSP will focus on improving student outcomes in key mathematics courses through continued implementation of its Quality Enhancement Plan; focus on improving access to academic support (i.e., tutoring); continued emphasis on strengthening academic advising.

Metric: Increase 6-year baccalaureate graduation rate	-.03%	29%	30%	32%	35%
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*USFSP earned this designation in 2011-12 and will retain this designation through 2015, the next application cycle.



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 28.4	\$ 26.1	\$ 24.6	\$ 24.4	\$ 21.0	\$ 16.9
Tuition	\$ 9.4	\$ 10.7	\$ 12.9	\$ 14.7	\$ 17.5	n/a
TOTAL MAIN OPERATIONS	\$ 37.7	\$ 36.7	\$ 37.5	\$ 39.1	\$ 38.5	\$ 16.9
EDUCATION & GENERAL TOTAL REVENUES	\$ 37.7	\$ 36.7	\$ 37.5	\$ 39.1	\$ 38.5	\$ 16.9

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	Data reported at the USF System Level
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Contracts & Grants

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

Revenues	Data reported at the USF System Level
----------	--

Local Funds

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

Revenues	Data reported at the USF System Level
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Faculty Practice Plans

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

Revenues	Data reported at the USF System Level
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OTHER BUDGET ENTITY TOTAL REVENUES	Data reported at the USF System Level
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UNIVERSITY REVENUES GRAND TOTAL	Data reported at the USF System Level
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$384	\$643	\$1,204	\$1,849	\$2,591
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,350	\$1,440	\$1,492	\$1,492	\$1,492
TOTAL TUITION AND FEES	\$4,604	\$5,183	\$5,796	\$6,441	\$7,183

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	41%	42%	40%	48%	48%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$19,640	\$20,181	\$20,827	\$22,836	\$23,000
Student Loan Cohort Default Rate (2nd Year)	4.9%	6.3%	7.0%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	xx%	xx%	10.1%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,200	\$1,500	\$9,190	\$1,600	\$2,500	\$19,990
AT HOME	\$5,200	\$1,500	\$4,590	\$1,600	\$2,500	\$15,390

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	646	35%	\$12,032	-\$2,281	\$7,043	\$4,709
\$40,000-\$59,999	239	13%	\$13,869	\$39	\$4,794	\$3,673
\$60,000-\$79,999	189	10%	\$15,411	\$2,124	\$2,783	\$3,881
\$80,000-\$99,999	183	10%	\$15,787	\$2,391	\$2,503	\$3,493
\$100,000 Above	441	24%	\$16,229	\$2,688	\$2,195	\$2,300
Missing	161	8%	\$15,572	\$4,606	\$143	\$96
TOTAL	1,859	100%	AVERAGE \$14,284	\$700	\$4,126	\$3,401

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate students
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	\$1,925,534
Total differential fee revenue generated in 2012-13 (projected):	\$3,947,438
Intended Uses	
<p>Cost-efficient utilization of instructional technology and innovation , along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> Technology & Research: Provide supplemental instruction and expanded undergraduate research opportunities through high-impact student success initiatives (e.g., the development of a Science Math and Research Technology SMART Lab, instructional and learning innovation) and distance learning for expanded access. Financial Counseling and Debt Reduction: Mitigate the financial impact of the increasing costs of higher education through focused and proactive financial counseling and debt reduction strategies. Advising: Enhance the current advising model through technology and staffing, with a focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours, and expanding USF's Veterans' Success program. Job Placement –Economic development: Broaden the high skilled workforce and direct economic impact of the university by: expanding STEM and IT programs, strengthening relationships with business and industry, engaging in co-op partnerships, and expanding professional support for job placement through USF's recently expanded Career Center/Job Hub. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>USF System efforts to move away from the traditional delivery model will be significantly impaired or delayed, potentially resulting in stagnant or declining graduation rates and a reduced ability to meet the workforce demands of the state. The loss of potential need-based financial aid (30%) will further reduce student access, retention and graduation rates while likely increasing student indebtedness. USF's commitment to investing in (70%) enhanced instruction and learning (particularly in STEM), serving returning veterans, reducing excess hours and student debt, and job placement for graduates will be diminished or, at best, delayed.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Improve graduation rates through QEP	QEP implementation ongoing, successful first year. Enhanced Career Center.
Increase faculty/student research and creative activity	Research funding at all-time high. Increased student presentations, research posters and papers and student research awards.
Enhanced undergraduate programs	New faculty in Psychology, History. Increased SCH production and course availability.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	16
Total Number of Advisors Hired or Retained (funded by tuition differential):	3
Total Number of Course Sections Added or Saved (funded by tuition differential):	97
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase the number of students who are awarded grants funded by the tuition differential.	We were able to increase the number of students paid by 278, or 120.3%.
Increase the average amount of awards in order to partially off-set tuition increases for needy students.	The average award increased by \$238, which represents an increase of 22.5%.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	509
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1293
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	122
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2500



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential

Budget Entity: 48900100 (Educational & General)

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

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	13.16	24.57
Advisors	2.18	10.00
Staff	3.08	7.08
Total FTE Positions:	18.42	41.65
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ 472,432	\$ 649,783
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ 472,432	\$ 649,783
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 2,021,904	3,947,438
Interest Revenue - Current Year	500	2,000
Interest Revenue - From Carryforward Balance	750	1,000
Total Receipts / Revenues:	\$ 2,023,154	\$ 3,950,438
<u>Expenditures</u>		
Salaries & Benefits	\$ 1,217,232	\$ 2,700,000
Other Personal Services	-	-
Expenses	12,000	12,000
Operating Capital Outlay	-	-
Student Financial Assistance	606,571	1,184,231
Expended From Carryforward Balance	10,000	500,000
**Other Category Expenditures	-	-
Total Expenditures:	\$ 1,845,803	\$ 4,396,231
Ending Balance Available:	\$ 649,783	\$ 203,989

*Since the 2011-12 year has not been completed, provide an estimated actual.

**Provide details for "Other Categories" used.



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University of South Florida - St. Petersburg							
Undergraduate Students	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% projected legislative increase)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	\$5.74	\$12.80	\$21.42	\$40.13	\$61.64	\$86.38	\$114.83
Total Base Tuition and Differential	\$94.33	\$108.47	\$124.74	\$143.45	\$164.96	\$189.70	\$218.15
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$10.40	\$24.80	\$24.80	\$25.05	\$25.05	\$25.05	\$25.05
Health	\$0.60	\$1.20	\$2.64	\$3.90	\$3.90	\$3.90	\$3.90
Athletic	\$2.25	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45
Transportation Access	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Student Green Energy (New authority - campus optional)			\$1.00	\$1.00	\$1.00	\$1.00	\$1.00
Sub total (credit hour fees)	\$29.10	\$45.02	\$48.22	\$51.73	\$51.73	\$51.73	\$51.73
Total Tuition and Fees per credit hour	\$123.43	\$153.49	\$172.96	\$195.18	\$216.69	\$241.43	\$269.88
% Change		24.4%	12.7%	12.8%	11.0%	11.4%	11.8%
Fees (block per term):							
Activity & Service							
Health							
Athletic	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
Transportation Access							
Total Block Fees per term	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.31	\$4,303.61	\$4,948.91	\$5,691.11	\$6,544.61
Total Fees for 30 Credit Hours	\$883.00	\$1,360.60	\$1,456.60	\$1,561.90	\$1,561.90	\$1,561.90	\$1,561.90
Total Tuition and Fees for 30 Credit Hours	\$3,712.90	\$4,614.70	\$5,198.91	\$5,865.51	\$6,510.81	\$7,253.01	\$8,106.51
\$ Change		\$901.80	\$584.21	\$666.60	\$645.30	\$742.20	\$853.50
% Change		24.3%	12.7%	12.8%	11.0%	11.4%	11.8%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$343.16	\$343.16	\$291.68	\$315.00	\$315.00	\$315.00	\$315.00
Out-of-State Undergraduate Student Financial Aid ³	\$17.15	\$17.15	\$14.58	\$15.75	\$15.75	\$15.75	\$15.75
Total per credit hour	\$360.31	\$360.31	\$306.26	\$330.75	\$330.75	\$330.75	\$330.75
% Change		0%	-15%	8%	0%	0%	0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.31	\$4,303.61	\$4,948.91	\$5,691.11	\$6,544.61
Total Fees for 30 Credit Hours	\$11,692.30	\$12,169.90	\$10,644.40	\$11,484.40	\$11,484.40	\$11,484.40	\$11,484.40
Total Tuition and Fees for 30 Credit Hours	\$14,522.20	\$15,424.00	\$14,386.71	\$15,788.01	\$16,433.31	\$17,175.51	\$18,029.01
\$ Change		\$901.80	-\$1,037.29	\$1,401.30	\$645.30	\$742.20	\$853.50
% Change		6.2%	-6.7%	9.7%	4.1%	4.5%	5.0%
Housing/Dining	\$6,746.00	\$7,420.00	\$7,570.00	7570	\$7,570.00	\$7,570.00	\$7,570.00
% Change		10%	2%	0%	0%	0%	0%
¹ can be no more than 5% of tuition. ³ can be no more than 5% of tuition and the out-of-state fee.							
² capped in statute.							



ENROLLMENT PLANNING

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

	5 YEAR TREND (2006-07 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	79%	1,284	37%	1,488	39%	1,518	39%	1,541	39%
FTIC (Profile Admit)	-31%	9	0%	15	0%	16	0%	16	0%
AA Transfers	-2%	1,310	38%	1,474	38%	1,503	38%	1,526	38%
Other Transfers	21%	831	24%	873	24%	890	24%	904	24%
Subtotal	25%	3,434	100%	3,850	100%	3,927	100%	3,987	100%
GRADUATE STUDENTS									
Master's	10%	403	100%	409	100%	417	100%	423	100%
Research Doctoral	n/a	n/a	n/n	n/a	xx%	n/a	xx%	n/a	xx%
Professional Doctoral	n/a	n/a	n/a	n/a	xx%	n/a	xx%	n/a	xx%
Subtotal	10%	403	100%	409	100%	417	100%	423	100%
NOT-DEGREE SEEKING	-27%	220		224		229		232	
MEDICAL	n/a	n/a		n/a		n/a		n/a	
TOTAL	18%	4,057		4,483		4,573		4,642	

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

	5 YEAR TREND (2006-07 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	663%	721	28%	858	30%	875	30%	889	30%
HYBRID (50%-79%)	%	0	0%	143	5%	234	8%	296	10%
TRADITIONAL (<50%)	7%	1887	72%	1860	65%	1809	62%	1777	60%
TOTAL	40.2%	2,608	100%	2,861	100%	2,918	100%	2,962	100%
GRADUATE									
DISTANCE (80%)	202%	62	24%	68	25%	72	26%	79	28%
HYBRID (50%-79%)	%	1	.4%	5	2%	14	5%	23	8%
TRADITIONAL (<50%)	-15%	198	76%	198	73%	191	69%	180	64%
TOTAL	3%	261	100%	271	100%	277	100%	282	100%

Note: *Five-yr trends are widely variable for new and emerging instructional programs; USFSP was earning separate accreditation during this time period and distance learning credits may not have been fully differentiated between USF and USFSP. Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. **Distance Learning** is a course in which at least 80 percent of the direct instruction of the course is delivered using some form of technology when the student and instructor are separated by time or space, or both (per 1009.24(17), F.S.). **Hybrid** is a course where 50% to 79% of the instruction is delivered using some form of technology, when the student and instructor are separated by time or space, or both (per SUDS data element 2052). **Traditional (and Technology Enhanced)** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for *no more* than 49% of instruction (per SUDS data element 2052).



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	657	1,055	657	1071	1,092	1,108	1,142	6.7%
UPPER DIVISION	1,486	1,692	1,486	1717	1,751	1,777	1,831	6.7%
GRAD I	227	259	227	264	270	275	283	7.2%
GRAD II	0	1	0	n/a	n/a	n/a	n/a	n/a
TOTAL	2,370	3,007	2,370	3,052	3,113	3,160	3,256	6.7%
Not a Florida Resident								
LOWER DIVISION	0	33	0	33	34	35	37	12%
UPPER DIVISION	0	39	0	40	41	42	44	10%
GRAD I	0	7	0	7	7	7	7	0%
GRAD II	0	0	0	n/a	n/a	n/a	n/a	n/a
TOTAL	0	79	0	80	82	84	88	10.0
TOTAL								
LOWER DIVISION	657	1088	657	1,104	1,126	1,143	1,179	6.8%
UPPER DIVISION	1,486	1,731	1,486	1,757	1,792	1,819	1,875	6.7%
GRAD I	227	266	227	271	277	282	290	7.0%
GRAD II	0	1	0	n/a	n/a	n/a x	n/a	n/a
TOTAL	2,370	3,086	2,370	3,132	3,195	3,244	3,344	6.8%
TOTAL (US FTE)	3,160	4,114	3,160	4,175	4,259	4,324	4,558	

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
NON-RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
TOTAL	NA	NA	NA	NA	NA	NA	NA	%
Dentistry Headcounts								
FLORIDA RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
NON-RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
TOTAL	NA	NA	NA	NA	NA	NA	NA	%
Veterinary Headcounts								
FLORIDA RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
NON-RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
TOTAL	NA	NA	NA	NA	NA	NA	NA	%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
World Languages and Cultures	16.0101	Globalization	UCF	No	50	August 2013

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

DOCTORAL PROGRAMS

New Programs To Be Considered by University in 2013-15 for Implementation

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



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
a. National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
b. Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
c. Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
d. Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
e. Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
f. Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the second year.
g. FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
h. AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
i. Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment

j. Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
k. Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
l. Master's Degrees Awarded	This is a count of graduate degrees granted.
m. Percent of Master's Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
n. Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
o. Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
p. Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
q. Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).

Goals Specific to Research Universities

Academic Quality

a. Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
b. National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
c. Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



d. Number of Science & Engineering disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
e. Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
f. Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
g. Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
h. Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
i. Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
j. Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
k. Science & Engineering research expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 minus table 52).
l. National rank is higher than predicted by available Financial Resources ranking based on US News & World Report	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
m. Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
n. Percent of Research Doctoral Degrees Awarded in STEM	The percentage of research doctoral degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
o. Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

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USF

Tampa

2012-13
Work Plan



University of South Florida - Tampa

Work Plan Presentation for 2012-13 Board of Governors Review

PENDING USF SYSTEM BOT APPROVAL



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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- c. Statement of Strategy
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- a. Goals Common to All Universities
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- a. Fiscal Information (*includes Tuition Differential Fee Request*)
- b. Enrollment Planning
- c. Academic Program Coordination

4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of South Florida's mission is to deliver competitive undergraduate, graduate and professional programs, to generate knowledge, to foster intellectual development, and to provide cutting-edge learning to ensure student success.

VISION STATEMENT (What do you aspire to?)

The University of South Florida envisions itself as a premier public research university with state, national and global impact, positioned for membership in the Association of American Universities.

USF is dedicated to: (i) Student success and access through a vibrant, interdisciplinary, and learner-centered environment; (ii) Research and scientific discovery to strengthen the economy, promote civic culture and the arts, and to design and build sustainable communities through the generation, dissemination, and translation of new knowledge across all academic and health-related disciplines; and (iii) Partnerships to build significant and integrated university-community collaborations through technological innovation, and sound scholarly and artistic activities.

STATEMENT OF STRATEGY (How will you get there?)

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

USF is a RU/VH institution attracting students and faculty of the highest caliber. In moving forward towards AAU eligibility, USF measures its progress by setting clear annual targets for a series of metrics and compares itself to its peer and aspirational peer institutions. USF uses national benchmarks to monitor: Broad measures of academic institutions through the Integrated Postsecondary Education Data System (IPEDS); Its position in the top tier of American research universities through the Carnegie Foundation for the Advancement of Teaching, along with its designation as a *Community Engaged University*; Performance indices through the Association of American Universities' (AAU); Ranking of research universities through the National Science Foundation (NSF); Ranking of the scope and quality of graduate programs through the National Research Council (NRC); Ranking by the annual report of the Top American Research Universities (TARU); Annual ranking of National Universities US News and World Report's (USNWR); Technology transfers, start-ups and patents through the Association of University Technology Managers (AUTM); Endowment standings through the National Association of Colleges and University Business Officers (NACUBO); Statistics on international education and study abroad through the Institute of International Education/Open Doors (IIE); Moody's credit rating; and Annual giving through Voluntary Support of Education (CAE/VSE). These data are available in several web sites and show trends and comparisons for many of these metrics over the last ten years.

[Planning, Performance and Accountability Matrix](#)

[PDF of the Planning Metrics Matrix](#)

[Performance Dashboard](#)



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

USF core capabilities include: Diversity; Excellence in teaching and learning; High impact scholarship, research and creative activities; Success and achievement of its students, faculty, staff and alumni; Shared governance; Collegiality, academic freedom, and professional responsibility; Entrepreneurial spirit, partnerships and innovation; Transparent accountability; Global research, community engagement and public service. The challenge will be to maintain institutional quality, increase educational and research productivity, and enhance revenue under dwindling state resources.

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1 Well-educated global citizens through continuing commitment to student success: (a) Provide first-class, comprehensive educational programs and student research opportunities to foster critical thinking and intellectual inquiry; (b) Develop diverse, dynamic global citizens and leaders to strengthen communities, and promote human rights and social justice; (c) Enhance opportunities for students by providing transformational learning that is intellectually, scientifically and technologically sound and produces relevant, applied skills and engaged outcomes including an increased commitment to STEM and health fields; and (d) Educate competitive, highly-skilled students ready to enter the workforce.

To reach this goal, USF will: Recruit high quality students; promote diversity; Infuse global content into existing and new curricula; Increase study abroad and funding/scholarships; Attract global students; Partner with international organizations; Increase student research awards; Increase graduate programs especially in STEM and health-related disciplines; Increase experiential learning opportunities.

2 High-quality research and innovation with global applications to change lives, improve health, and foster sustainable development and positive societal change: (a) Engage in high impact research, scholarship and creative activities that generate new knowledge; (b) Increase research opportunities; (c) Develop strategic interdisciplinary research initiatives that solve critical problems; and (d) Promote community engaged scholarship and creative activities to benefit all members of society.

To reach this goal, USF will: Recruit and retain high quality faculty; build a sustainable research infrastructure; research and grant opportunities; provide training programs that increase the rate of successful funding from national agencies; employ emerging technologies to enhance research and engagement; increase corporate partnerships; promote health and technology innovation; strengthen collaborative partnerships with health, educational, allied science, and engineering entities.

3 A first-class, higher educational institution that drives Tampa Bay region's economic engine: (a) Demonstrate financial security via a sustainable economic base in all business practices; (b) Pursue entrepreneurial endeavors that augment revenue and maximize institutional effectiveness; (c) Establish mutually beneficial partnerships (internal and external) that enhance student access to academic programs, research and employment opportunities; and (d) Provide stewardship of a university that represents the cornerstone of economic and cultural significance for the community.

To reach this goal, we will: Define, inform and generate new efficient and effective budget practices; increase understanding and transparency of fiscal affairs and financial longevity; enhance institutional infrastructure by securing mutually beneficial partnerships. market the USF brand via strategic dissemination of information; increase revenue generating patents; establish USF as a community fostering partnerships, employment, k-12 schools, residential opportunities and alumni engagement.



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
USF will (a) Engage in high impact student success research; (b) Establish partnerships to enhance student access to academic programs, and research; and (c) Educate competitive, highly-skilled (STEM) students ready to enter the workforce. Investment in STEM and ranked programs will continue.					
Avg. SAT Score	-1% ¹	1136	1162	1170	1180
Avg. High School GPA (on 4.0 scale)	5%	3.68	3.81	3.83	3.85
Professional/Licensure Exam					
First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	3	3	4	4
Exams Below National/State Benchmark	n/a	2	2	1	1
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	1	2	4	2	
Operational Efficiency					
Freshman Retention Rate	6%	88.3%	88.5%	89%	90%
FTIC Graduation Rates					
In 4 years (or less)	14%	34.8%	35%	36%	38%
In 6 years (or less)	7%	50.9%	52%	52%	54%
AA Transfer Graduation Rates					
In 2 years (or less)	1%	27.9%	28%	29%	30%
In 4 years (or less)	5%	62.1%	62.5%	63%	64%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	5	6	5	6	
Return on Investment					
Bachelor's Degrees Awarded	36%	6,842	7,192	7,250	7,350
Percent of Bachelor's Degrees in STEM	2%	22.7%	23.9%	24.5%	25.8%
Graduate Degrees Awarded	35%	2,715	2,845	2,900	3,000
Percent of Graduate Degrees in STEM	1%	23%	22%	21%	23%
Percent of Baccalaureate Graduates Employed in Florida	n/a	Data available only at the USF System level			
Percent of Baccalaureate Graduates Continuing their Education (in FL)	n/a	Data available only at the USF System level			
Annual Gifts Received (\$M)	n/a	Data available only at the USF System level			
Endowment (\$M)	n/a	Data available only at the USF System level			
SUBTOTAL OF IMPROVING METRICS	4	3	1	4	
TOTAL OF IMPROVING METRICS	10	11	10	12	

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	20%	6 est	10	12	14
National Academy Members	50%	3	3	4	5
Number of Post-Doctoral Appointees	64%	293	310	312	320
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures (based on 8 broad discipline areas, and includes private universities)	n/a	Data available only at the USF System level			
SUBTOTAL OF IMPROVING METRICS	3		2	3	3
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) (includes non-Science & Engineering disciplines)	n/a	\$ 394.9	\$ 414.7	\$ 435.4	\$ 457.2
Science & Engineering Research Expenditures (\$M)	20%	\$ 343.0	\$ 360.2	\$ 378.2	\$ 397.1
Percent of Research Expenditures funded from External Sources	n/a	77.76%	81.65%	85.73%	90.02%
Patents Issued	279%	91	84	67	50
Licenses/Options Executed	71%	36	37	40	48
Licensing Income Received (\$M)	-24%	\$ 1.3	\$ 1.3	\$ 2.5	\$ 2.75
Number of Start-up Companies	33%	8	5	7	8
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	24%	\$136.0	\$142.8	\$149.9	\$157.4
National Rank is Higher than Predicted by the Financial Resources Ranking (based on U.S. News & World Report)	n/a	181-173	n/a	n/a	n/a
Research Doctoral Degrees Awarded	44%	267	277	283	340
Professional Doctoral Degrees Awarded	30%	156	156	158	165
SUBTOTAL OF IMPROVING METRICS	x		6	10	11
TOTAL OF IMPROVING METRICS	x		8	13	14

Notes: (1) the most recent faculty Awards data is based on 2009-10 data.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Graduate Degrees in Areas of Strategic Emphasis	35%	1225	1250	1275	1350
Freshman in Top 10% of Graduating High School Class	13%	23%	24%	24.5%	25.5%
Percent of Course Sections Offered via Distance and Blended Learning	11%	11.5%	12.5%	13.5%	14.5%

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

Goal 1. As an RU/VH institution, with a strategic goal of engaging in high impact research, USF will continue to build a sustainable research infrastructure, including total research expenditures as defined by the National Science Foundation.

Total Research Expenditures	n/a	\$ 394.9	\$ 414.7	\$ 435.4	\$ 457.2
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Goal 2. As an RU/VH institution, with a strategic goal of engaging in high impact research, USF will continue to build a sustainable research infrastructure, including federal research expenditures as defined by the National Science Foundation.

Federal Research Expenditures	n/a	\$243	\$255.2	\$267.9	\$281.3
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OPERATIONS

Draft



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 253.88	\$ 239.02	\$ 218.00	\$ 217.61	\$ 181.80	\$ 151.52*
Tuition	\$ 93.43	\$ 95.74	\$ 103.95	\$ 118.18	\$ 133.35	n/a
TOTAL MAIN OPERATIONS	\$ 347.30	\$ 334.76	\$ 321.95	\$ 335.80	\$ 315.15	\$ 151.52*
Education & General – Health-Science Center / Medical Schools						
State Funds	\$66.7	\$ 62.8	\$ 66.6	\$ 68.3	\$ 64.8	\$65.2*
Tuition	\$ 22.6	\$ 26.3	\$ 30.0	\$ 32.9	\$ 34.5	n/a
TOTAL HSC	\$ 89.3	\$ 89.1	\$ 96.6	\$ 101.2	\$ 99.3	\$ 65.2*
EDUCATION & GENERAL TOTAL REVENUES	\$ 436.60	\$ 423.86	\$ 418.55	\$ 437.00	\$ 414.45	\$ 216.72*

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

*Per SB1994, the 2012-13 appropriations state funds amount includes the \$10M funding amount and \$6M for Pharmacy

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues Data are reported at the USF System level

Contracts & Grants

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

Revenues Data are reported at the USF System level

Local Funds

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

Revenues Data are reported at the USF System level

Faculty Practice Plans

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

Revenues Data are reported at the USF System level

OTHER BUDGET ENTITY TOTAL REVENUES

Data are reported at the USF System level

UNIVERSITY REVENUES GRAND TOTAL

Data are reported at the USF System level



FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$660	\$960	\$1,569	\$2,269	\$3,074
Percent Increase	15%	15%	15%	15%	15%
Required Fees¹	\$1,668	\$1,746	\$1,768	\$1,768	\$1,768
TOTAL TUITION AND FEES	\$5,198	\$5,806	\$6,437	\$7,137	\$7,942

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	53%	52%	52%	53%	53%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$18,517	\$19,963	\$21,811	\$21,784	\$21,784
Student Loan Cohort Default Rate (2nd Year)	4.9%	6.3%	7.0%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	xx%	xx%	10.1%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$5,800	\$1,500	\$9,190	\$1,600	\$2,500	\$20,590
AT HOME	\$5,800	\$1,500	\$4,590	\$1,600	\$2,500	\$15,990

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	6,650	38%	\$11,495	-\$3,009	\$8,429	\$4,219
\$40,000-\$59,999	2,243	13%	\$13,822	-\$419	\$5,909	\$4,106
\$60,000-\$79,999	1,774	10%	\$15,771	\$1,740	\$3,801	\$4,323
\$80,000-\$99,999	1,477	8%	\$16,632	\$2,633	\$2,911	\$4,094
\$100,000 Above	4,301	24%	\$16,617	\$2,590	\$2,977	\$2,913
Missing	1,156	7%	\$17,853	\$4,656	\$815	\$219
TOTAL	17,601	100%	AVERAGE \$14,323	\$145	\$5,346	\$3,623

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire university
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All university undergraduate courses
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$52.29
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$20.29
\$ Increase in tuition differential for 30 credit hours:	\$608.70
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$14,039,416
Total differential fee revenue generated in 2012-13 (projected):	\$29,831,109
Intended Uses	
<p>Cost-efficient utilization of instructional technology and innovation , along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> Technology & Research: Provide supplemental instruction and expanded undergraduate research opportunities through high-impact student success initiatives (e.g., the development of a Science Math and Research Technology SMART Lab, instructional and learning innovation) and distance learning for expanded access. Financial Counseling and Debt Reduction: Mitigate the financial impact of the increasing costs of higher education through focused and proactive financial counseling and debt reduction strategies. Advising: Enhance the current advising model through technology and staffing, with a focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours, and expanding USF's Veterans' Success program. Job Placement –Economic development: Broaden the high skilled workforce and direct economic impact of the university by: expanding STEM and IT programs, strengthening relationships with business and industry, engaging in co-op partnerships, and expanding professional support for job placement through USF's recently expanded Career Center/Job Hub. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>USF System efforts to move away from the traditional delivery model will be significantly impaired or delayed, potentially resulting in stagnant or declining graduation rates and a reduced ability to meet the workforce demands of the state. The loss of potential need-based financial aid (30%) will further reduce student access, retention and graduation rates while likely increasing student indebtedness. USF's commitment to investing in (70%) enhanced instruction and learning (particularly in STEM), serving returning veterans, reducing excess hours and student debt, and job placement for graduates will be diminished or, at best, delayed.</p>	
Request to Modify or Waive Tuition Differential Uses	
<p>(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))</p>	



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Improve Baccalaureate retention and graduation	<ul style="list-style-type: none"> Retained faculty Strengthened student advising system by hiring and retaining advisors Maintained course offerings for students
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	46 faculty equivalents hired or retained
Total Number of Advisors Hired or Retained (funded by tuition differential):	40 advisors hired or retained
Total Number of Course Sections Added or Saved (funded by tuition differential):	184 sections saved
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Increase the number of students who are awarded grants funded by the tuition differential.	The number of students supported increased to 6,116 (an increase of 2,860 students, or 87.8%)
Increase the average amount of awards in order to partially off-set tuition increases for needy students.	The average award increased by \$137, which represents an increase of 11.5%.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	6,116
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1,324
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	100
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2,500



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2011-12 AND 2012-13

University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
<u>FTE Positions:</u>		
Faculty	46.0	123.0
Advisors	40.0	51.0
Staff		-
Total FTE Positions:	86.0	174.0
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 18,218,939	29,831,109
Interest Revenue - Current Year	31,992	52,384
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 18,250,931	\$ 29,883,493
<u>Expenditures</u>		
Salaries & Benefits	\$ 12,775,651	\$ 20,918,443
Other Personal Services	-	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	5,475,280	8,965,050
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ 18,250,931	\$ 29,883,493
Ending Balance Available:	\$ -	\$ -
*Since the 2011-12 year has not been completed, provide an estimated actual.		
**Provide details for "Other Categories" used.		



FISCAL INFORMATION (continued)

UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

University of South Florida - Main Campus							
<u>Undergraduate Students</u>	<u>Actual</u>			<u>Projected</u>			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% projected legislative increase)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	\$13.74	\$22.00	\$32.00	\$52.29	\$75.63	\$102.47	\$133.33
Total Base Tuition and Differential	\$102.33	\$117.67	\$135.32	\$155.61	\$178.95	\$205.79	\$236.65
% Change		15.0%	15.0%	15.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$9.31	\$11.28	\$11.28	\$11.71	\$11.71	\$11.71	\$11.71
Health	\$8.60	\$9.30	\$9.73	\$9.73	\$9.73	\$9.73	\$9.73
Athletic	\$11.76	\$13.73	\$14.15	\$14.46	\$14.46	\$14.46	\$14.46
Transportation Access	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00	\$3.00
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Other (list): Marshall Center	\$1.50	\$1.50	\$1.50	\$1.50	\$1.50	\$1.50	\$1.50
Student Green Energy			\$1.00	\$1.00	\$1.00	\$1.00	\$1.00
Academic Enrichment and Opportunity							
Sub total (credit hour fees)	\$47.77	\$53.13	\$55.74	\$58.48	\$58.48	\$58.48	\$58.48
Total Tuition and Fees per credit hour	\$150.10	\$170.80	\$191.06	\$214.09	\$237.43	\$264.27	\$295.13
% Change		13.8%	11.9%	12.1%	10.9%	11.3%	11.7%
Fees (block per term):							
Activity & Service	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00	\$7.00
Health							
Athletic	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00	\$10.00
Transportation Access							
Other (list): Marshall Center	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00
Total Block Fees per term	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00	\$37.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60	\$4,668.30	\$5,368.50	\$6,173.70	\$7,099.50
Total Fees for 30 Credit Hours	\$1,507.10	\$1,667.90	\$1,746.20	\$1,828.40	\$1,828.40	\$1,828.40	\$1,828.40
Total Tuition and Fees for 30 Credit Hours	\$4,577.00	\$5,198.00	\$5,805.80	\$6,496.70	\$7,196.90	\$8,002.10	\$8,927.90
\$ Change		\$621.00	\$607.80	\$690.90	\$700.20	\$805.20	\$925.80
% Change		13.6%	11.7%	11.9%	10.8%	11.2%	11.6%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$343.16	\$343.16	\$291.68	\$315.00	\$315.00	\$315.00	\$315.00
Percentage change			-15.0%				
Out-of-State Undergraduate Student Financial Aid ³	\$17.15	\$17.15	\$14.58	\$15.75	\$15.75	\$15.75	\$15.75
Total per credit hour	\$360.31	\$360.31	\$306.26	\$330.75	\$330.75	\$330.75	\$330.75
% Change		0%	0%	8%	0%	0%	0%
Total Tuition for 30 Credit Hours	\$3,069.90	\$3,530.10	\$4,059.60	\$4,668.30	\$5,368.50	\$6,173.70	\$7,099.50
Total Fees for 30 Credit Hours	\$12,316.40	\$12,477.20	\$10,934.00	\$11,750.90	\$11,750.90	\$11,750.90	\$11,750.90
Total Tuition and Fees for 30 Credit Hours	\$15,386.30	\$16,007.30	\$14,993.60	\$16,419.20	\$17,119.40	\$17,924.60	\$18,850.40
\$ Change		\$460.20	\$529.50	\$1,425.60	\$700.20	\$805.20	\$925.80
% Change		4.0%	-6.3%	9.5%	4.3%	4.7%	5.2%
Housing/Dining	\$8,750.00	\$9,000.00	\$9,360.00	\$9,360.00	\$9,360.00	\$9,360.00	\$9,360.00
% Change		2.9%	4.0%	0.0%	0.0%	0.0%	0.0%

¹ can be no more than 5% of tuition.

² capped in statute.



ENROLLMENT PLANNING

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

	5 YEAR TREND <i>(2005-06 to 2010-11)</i>	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR <i>(2014-15)</i> PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	1%	16,226	54%	16,000	52%	15,600	52%	15,100	51%
FTIC (Profile Admit)	-60%	218	1%	200	1%	200	1%	200	1%
AA Transfers*	31%	9,518	30%	9,125	29%	8,725	29%	8,550	29%
Other Transfers	-2%	5,363	17%	5,575	18%	5,375	18%	5,500	19%
Subtotal	6%	31,325	100%	30,900	100%	29,900	100%	29,350	100%
GRADUATE STUDENTS									
Master's	20%	5,935	67%	6,050	66%	6,200	65%	6,350	64%
Research Doctoral	23%	2,289	26%	2,425	26%	2,600	27%	2,750	28%
Professional Doctoral	24%	604	7%	700	8%	750	8%	750	8%
Subtotal	21%	8,828	100%	9,175	100%	9,550	100%	9,850	100%
NOT-DEGREE SEEKING	-5%	1,693		1,524		1,650		1,800	
MEDICAL	%Δ	473		480		480		480	
TOTAL	%Δ	42,319		42,079		41,580		41,480	

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

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

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	17%	3,555	18%	3733	18%	3920	18%	4116	18%
HYBRID (50%-79%)	0%	322	2%	338	2%	355	2%	373	2%
TRADITIONAL (<50%)	83%	16260	81%	17073	81%	17927	81%	18823	81%
TOTAL	100%	20,137	100%	21,144	100%	22,201	100%	23,312	100%
GRADUATE									
DISTANCE (80%)	19%	980	19%	1029	19%	1080	19%	1134	19%
HYBRID (50%-79%)	0%	107	2%	112	2%	118	2%	124	2%
TRADITIONAL (<50%)	81%	4016	79%	4217	79%	4428	79%	4649	79%
TOTAL	100%	5,102	100%	5,358	100%	5,626	100%	5,907	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	8617	7763	8617	7651	7592	7586	7747	0.3%
UPPER DIVISION	9999	10070	9999	10662	10416	10244	10351	-0.74%
GRAD I	2672	2211	2672	2212	2179	2166	2216	0.05%
GRAD II	623	807	623	751	763	778	821	2%
TOTAL	21911	20851	21911	20,522	20,512	20,609	21,135	-0.17%
Not a Florida Resident								
LOWER DIVISION	0	349	0	522	606	709	995	17%
UPPER DIVISION	0	344	0	452	491	537	647	10%
GRAD I	0	310	0	410	440	473	547	8%
GRAD II	0	437	0	519	545	572	630	5%
TOTAL	1302	1439	1302	1902	2082	2291	2820	11%
Total								
LOWER DIVISION	8617	8112	8617	8173	8198	8295	8742	2%
UPPER DIVISION	9999	10414	9999	11114	10907	10781	10998	-0.3%
GRAD I	2672	2521	2672	2621	2620	2639	2763	1%
GRAD II	623	1244	623	1270	1307	1350	1452	3%
TOTAL	23,213	22,290	23,213	23,179	23,031	23,065	23,955	1%
TOTAL (US FTE)	30,950	29,720	30,950	30,897	30,701	30,745	31,932	%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	480	445	480	436	432	432	432	-0.18%
NON-RESIDENT	0	32	0	44	48	48	48	1.76%
TOTAL	480	477	480	480	480	480	480	0.00%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered for Implementation (for 2012-2013) USF

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT in 5th year	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
B.A. Film and New Media Studies (Tampa)	50.0602	No	FSU,UF,UNF,UWF,UCF, UM,FIU,FAU		117	May 2013

**Program has not completed internal approval process*

***Substitution for B.S. Digital Design & Tech.*

MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Sports & Entertainment Mgt (Tampa)	31.0504	No	FAMU,FAU,FIU,FSU, UCF,UF	N	25	May 2013
Athletic Training (Tampa)	51.0913	No	FIU	N	30	May 2013
Metabolic & Nutritional Medicine (Tampa)	26.9999	STEM	None	N/Y	37.5	May 2013

**Program has not completed internal review process*



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see link , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

UWF

2012-13 Work Plan



University of West Florida

Work Plan Presentation for 2012-13 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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4. DEFINITIONS



MISSION STATEMENT (What is your purpose?)

The University of West Florida (UWF) is a public university based in Northwest Florida with multiple instructional sites and a strong virtual presence. UWF's mission is to provide students with access to high-quality, relevant, and affordable undergraduate and graduate learning experiences; to transmit, apply, and discover knowledge through teaching, scholarship, research, and public service; and to engage in community partnerships that respond to mutual concerns and opportunities and that advance the economy and quality of life in the region.

UWF is committed to planning and investing strategically to enhance student access and educational attainment; to build on existing strengths and develop distinctive academic and research programs and services that respond to identified regional and state needs; and to support highly qualified faculty and staff who engage students in rigorous, high-impact, student-oriented learning experiences that enhance personal and professional development and empower alumni to contribute responsibly and creatively to a complex 21st Century global society.

VISION STATEMENT (What do you aspire to?)

The University of West Florida aspires to be widely recognized as a model of excellence and relevance, sought out as a distinctive intellectual and cultural center, valued as an engaged partner, and acclaimed for being "different by design."

STATEMENT OF STRATEGY (How will you get there?)

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

Using its multiple instructional sites and strong virtual presence, UWF delivers a range of high-quality baccalaureate and master's programs, as well as targeted doctoral offerings, that are responsive to regional and state needs. The majority of UWF's students come from the Panhandle, but UWF is helping to address higher education access needs by enrolling an increasing number of students from the Florida peninsula and beyond. A significant number of UWF's students come from families with a military connection. UWF will manage growth strategically at the main campus, at other sites, and online, and will target recruitment efforts to incorporate an appropriate balance of first-time-in-college, transfer, and graduate students; residential and commuter students; traditional and older adults; military personnel and veterans; and students from diverse racial, ethnic, educational, cultural, and socioeconomic backgrounds. Through its partnerships with the K-12 sector and other institutions of higher education (e.g., Florida Colleges in NW Florida, other SUS institutions), UWF will facilitate students' transition to the University and provide students with access to academic programs that might otherwise not be available to them. To enhance the collegiate experience for the traditional-aged student, UWF is investing in improving campus life and expanding high-quality advising and tutoring services. UWF is addressing nontraditional learners' needs through the proposed statewide Degree Completion Initiative; providing one-stop services to military-affiliated students through its Military/Veterans Center; strengthening its articulation programs with state colleges; establishing high-demand online programs to strengthen Florida's workforce; and reinforcing UWF's innovative online curriculum through participation in *Quality Matters* to assure high-quality instruction. UWF is committed to offering undergraduate and graduate degrees that meet regional workforce needs, including implementing practices that help students prepare effectively for life beyond graduation.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

UWF has evolved into a vibrant, distinctive, educational institution with an undergraduate collegiate culture characteristic of a regional comprehensive university, but with expanded graduate and targeted research programs, nationally recognized online programs, and extensive community service and engagement. UWF favors smaller classes with fully qualified teacher-scholars who deliver personalized, innovative, hands-on learning and leadership opportunities. UWF takes pride in the strong, mutually beneficial collaborations (reflected in its curriculum and its focus on applied research, as well as its public-private partnerships) that have emerged with UWF's partners in the community, business, military, and education.

UWF's institution-wide strategic planning discussions have targeted various opportunities and challenges for improvement, including, but not limited to, (1) purposeful enrollment growth; (2) student retention and graduation rates; (3) strengthened student professional workforce skills; (4) physical infrastructure enhancements; (5) comprehensive degree planning to ensure viable programs that meet regional needs; (6) efforts to increase the number of Floridians with degrees in areas such as STEM, Education, Health Professions (including building on the success UWF has had in its outreach to students in the K-12 sector to create and encourage their interests in these critical areas).

KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. **Strategic Priority -- Foster student learning and development to include the knowledge, skills, and dispositions that optimize students' prospects for personal and professional success.**
 - » Starting with General Studies and continuing through the undergraduate major and graduate studies, emphasize 21st Century skills, including student learning outcomes associated with professional readiness and career development.
 - » Collaborate with business, educational, and community partners to expand opportunities for students to engage in high-impact, experiential learning activities that educational research indicates improve student engagement, learning, retention, and subsequent job placement and professional success (e.g., internships, research, service learning, study abroad, practicum placements, related professional experiences). [Academic Quality and Return on Investment]
2. **Strategic Priority -- Improve student persistence and timely progression to degree attainment.**
 - » Develop and implement a University-wide comprehensive plan to improve undergraduate student retention and timely degree completion through strong academic programs, improved academic support, and robust student life experiences. [Refer to the Undergraduate Student Success Initiative listed in the Tuition Differential Request for more details.]
[Academic Quality, Operational Efficiency, and Return on Investment]
3. **Strategic Priority -- Maximize the acquisition and deployment of resources, and strategically align and integrate planning, budgeting, assessment, and continuous improvement efforts.**
 - » Develop new revenue streams and increase total financial resources to ensure UWF has sufficient funds to support the mission, vision, and values of the University.
 - » Develop and execute a University-wide coordinated and strategic recruitment and enrollment plan that defines an optimal student profile within the context of UWF's mission and available resources. Develop strategies for enhancing the degree to which prospective students select UWF as their first choice for higher education. [Operational Efficiency and Return on Investment]



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

	5 YEAR TREND (05-06 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
National Ranking for University and Programs					
<u>Describe plans for increasing national preeminence of University and select programs.</u>					
<ul style="list-style-type: none"> Maintain recognition from Forbes Magazine as one of America's Top Colleges, from The Princeton Review as one of the best colleges in the Southeast and as a "Green College," from U.S. News and World Reports as one of the Top Online Education Programs, from The Chronicle of Higher Education as one of the "Great Colleges to Work For," and from G.I. Jobs Magazine as a Military Friendly School. Increase success in fielding student competitors who win in state, regional, and national academic competitions (e.g., logistics; Model UN, forensics). Continue success in documenting through Program Reviews that UWF academic programs and institutes and centers deliver on the promises of their respective mission and vision statements. Develop and implement an academic program master plan that, within the context of UWF's mission and available resources, includes strategies for moving select academic and research programs to greater levels of distinction; and aligns resources to support these initiatives. 					
Avg. SAT Score	1.8% ¹	1542	1481	1509	1565
Avg. High School GPA (on 4.0 scale)	0.0%pt	3.6	3.4	3.4	3.5
Professional/Licensure Exam First-time Pass Rates ²					
Exams Above National/State Benchmark	n/a	1	1	1	1
Exams Below National/State Benchmark	n/a	0	0	0	0
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS	1		1	2	3
Operational Efficiency					
Freshman Retention Rate		TBD	TBD	TBD	TBD
FTIC Graduation Rates					
In 4 years (or less)		TBD	TBD	TBD	TBD
In 6 years (or less)					
AA Transfer Graduation Rates					
In 2 years (or less)		TBD	TBD	TBD	TBD
In 4 years (or less)					
Percent of Bachelor's Degrees Without Excess Hours		Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	1		5	5	5



KEY PERFORMANCE INDICATORS

Goals Common to All Universities (continued)

Return on Investment					
Bachelor's Degrees Awarded	11.5%	1903	2012	2061	2158
Percent of Bachelor's Degrees in STEM	0.5%pt	16.5%	16.1%	16.3%	16.8%
Graduate Degrees Awarded	48.9%	621	565	579	606
Percent of Graduate Degrees in STEM	9.1%pt	16.1%	11.9%	12.2%	12.7%
Percent of Baccalaureate Graduates Employed in Florida	-4.0%pt	60% ³	60.8%	61.6%	63.2%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	1.0%pt	19% ³	19.2%	19.4%	19.8%
Annual Gifts Received (\$M)	13.5%	\$ 2.6	\$ 3.5	\$ 3.85	\$ 4.2
Endowment (\$M)	1.2%	\$ 55.7	\$ 62.5	\$ 65.0	\$ 70.0
SUBTOTAL OF IMPROVING METRICS	7		5	8	8
TOTAL OF IMPROVING METRICS	9		12	16	17

Notes: (1) SAT trends are based on 3 year average, (2) Professional licensure pass rates are based on the 2010-11 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2009-10 data from FETPIP. (4) P references PRELIMINARY DATA.



KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will select three metric goals from the following list of metrics included in the 2012-2025 System Strategic Plan:

Freshman in Top 10% of Graduating High School Class	Bachelor's Degrees in Areas of Strategic Emphasis
Percentage of Eligible Programs with Specialized Accreditation	Graduate Degrees in Areas of Strategic Emphasis
Average Time to Degree for FTICs	Number of Faculty Designated a Highly Cited Scholar
Bachelor's Degrees Awarded to Minorities	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Number of Adult (age 25+) Undergraduates Enrolled	Percentage of Students Participating in Identified Community and Business Engagement Activities
Percent of Course Sections Offered via Distance and Blended Learning	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Average Time to Degree for FTICs (4-year trend)	-8.5%	5.1	5.0	4.9	4.7
Number of Adult (age 25+) Undergraduates Enrolled	8.0%	2,976	3,022	3,069	3,165

Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)

Develop and implement an institutional plan to coordinate and focus the University's continuing efforts to identify community stakeholders, cultivate partnerships, and learn more about specific economic, workforce, educational, research, and cultural needs and opportunities. Collaborate with partners to promote engagement and service opportunities through a broad array of programs, research, and other activities to address identified needs within the context of UWF's mission and available resources. [Activities will include student, faculty, and staff participation in identified community and business engagement activities.] Prepare documentation for submission to Carnegie.

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

Goal 1. Improve student engagement as measured on the National Survey of Student engagement (NSSE).

NSSE Results on five select subsections for seniors: (1) Level of Academic Challenge, (2) Active and Collaborative Learning, (3) Student-Faculty Interaction, (4) Enriching Educational Experiences, and (5) Supportive Campus Environment [Metric: Number of five subsections showing improvement]

NA

NA

5

NA

5

Goal 2. Facilitate student's access to UWF by increasing donor support for student financial aid.

Total Privately Funded Scholarships Awarded	30.4%	\$1,142,594	\$1,076,145	\$1,140,000	\$1,222,000
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OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2007-08 Actual	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Appropriations
Education & General – Main Operations						
State Funds	\$ 76,836,830	\$ 65,006,959	\$ 61,440,568	\$ 63,019,452	\$ 53,181,126	\$ 41,434,296
Tuition	\$ 25,958,672	\$ 26,633,995	\$ 31,331,183	\$ 36,055,946	\$ 38,574,235	n/a
TOTAL MAIN OPERATIONS	\$ 102,795,502	\$ 91,640,954	\$ 92,771,751	\$ 99,075,398	\$ 91,755,361	n/a
Education & General – Health-Science Center / Medical Schools						
State Funds	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Tuition	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
TOTAL HSC	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Tuition	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
TOTAL IFAS	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 102,795,502	\$ 91,640,954	\$ 92,771,751	\$ 99,075,398	\$ 91,755,361	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2012-13 year.

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues	\$ 12,732,929	\$ 14,675,742	\$ 14,648,590	\$ 16,202,669	\$ 15,957,497	n/a
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Contracts & Grants

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

Revenues	\$ 19,357,694	\$ 16,897,264	\$ 20,167,307	\$ 19,619,573	\$ 17,782,242	n/a
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Local Funds

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

Revenues	\$ 45,364,574	\$ 50,478,974	\$ 72,296,518	\$ 78,825,868	\$ 87,093,509	n/a
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Faculty Practice Plans

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

Revenues	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ 77,455,197	\$ 82,051,980	\$ 107,112,415	\$ 114,648,110	\$ 120,833,248	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ 180,250,699	\$ 173,692,934	\$ 199,884,166	\$ 213,723,508	\$ 212,588,609	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870.10	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
Tuition Differential Fee	\$384.00	\$642.60	\$1,203.90	\$1,849.20	\$2,591.40
Percent Increase	15%	15%	15%	15%	15%
Required Fees ¹	\$1,539.60	\$1,683.00	\$1,972.50	\$2,074.50	\$2,074.50
TOTAL TUITION AND FEES	\$4,793.70	\$5,425.20	\$6,276.00	\$7,023.30	\$7,765.50

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	48%	49%	49%	49%	52%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$14,346	\$14,590	\$14,925	\$16,342	\$17,893
Student Loan Cohort Default Rate (2nd Year)	3.5%	3.8%	5.5%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)			8.4%	n/a	n/a

Note: Student Loan cohort default data includes undergraduate and graduate students.

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	\$4,702	\$1,200	\$8,094	\$1,000	\$2,400	\$17,396
AT HOME	\$4,702	\$1,200	\$3,100	\$1,700	\$2,100	\$12,802

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2011-12)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
Below \$40,000	2,117	44%	\$9,086	\$-2,405	\$7,272	\$7,633
\$40,000-\$59,999	652	13%	\$11,252	\$391	\$4,573	\$6,958
\$60,000-\$79,999	497	10%	\$12,236	\$1,575	\$3,365	\$7,178
\$80,000-\$99,999	480	10%	\$12,750	\$2,121	\$2,847	\$7,089
\$100,000 Above	1,094	23%	\$13,163	\$2,426	\$2,561	\$7,079
Missing	8	.17%	\$15,274	\$2,833	\$1,862	\$7,250
TOTAL	4,848	100%	AVERAGE \$10,827	\$ -241	\$5,165	\$7,331

Notes: This data only represents Fall and Spring financial aid data, and is accurate as of March 31, 2012. Please note that small changes to Spring 2012 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 14, 2012
Implementation Date (month/year):	Fall 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	All locations.
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate courses.
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	15%
\$ Increase in tuition differential per credit hour:	\$18.71
\$ Increase in tuition differential for 30 credit hours:	\$561.30
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected) :	\$3,498,890
Total differential fee revenue generated in 2012-13 (projected):	\$7,776,088
Intended Uses	
<p>Describe how the revenue will be used.</p> <p>Of the total of \$3,498,890, 30% or \$1,049,667 will be used for need based aid. The remaining \$2,449,223 will be used for the following initiatives:</p> <ol style="list-style-type: none"> 1. Support for the Student Persistence and Completion Initiative (\$201,714) – The primary objective of this initiative is to improve retention and graduation rates for undergraduate students. This initiative, supported by funds from differential tuition, will focus on First-Time-In-College (FTIC) students but also addresses students' progress throughout their career at UWF. The goal during the three year planning period is to increase the first year retention rate by 1.0% above the baseline of 72.3% (retention rate based on CDS definition for purposes of comparison with peer institutions) for Fall 2011. This experience will target activities that focus on improving students' academic strategies to successfully progress through their curriculum. Highlights of the initiative are described below: <ol style="list-style-type: none"> i. Create a first year success team which will systematically review and evaluate the effectiveness of student success programs and strategies and intervene where necessary. ii. Enhance the Academic Foundations Seminar offerings, generally known as first year experience courses, which are considered best practice in introducing students to the university learning experience and institutional services and support that are available to them. 	



- iii. Enhance the early warning program which is a program designed to assist FTIC students who demonstrate academic hardship or red flag behaviors at the midterm of the semester.
- iv. Create policies and systems to increase institutional intervention with students withdrawing from courses or failing to register for subsequent semesters.
- v. Develop a four-year coherent plan of career services for FTIC's to gain more clarity about selecting a major that leads to a career path.

2. **Recruit and Hire Additional Full Time Faculty (\$1,931,057)** – The primary objectives of this initiative are to improve retention and graduation rates and to maintain a student-to faculty-ratio of 24:1. Since 2007, UWF has increased its enrollment particularly at the lower division (22.6%) despite sizable reductions in state support. To accommodate the additional enrollment growth, UWF will use approximately \$1.75 million of the total tuition differential to hire approximately 21 additional full-time faculty adding an estimated 147 undergraduate course sections. The remainder of the funding (approximately \$187,000) will be used to hire adjunct faculty to teach an estimated 83 undergraduate course sections. Overall, this funding initiative will assist the University in its efforts to schedule a sufficient number of undergraduate course offerings to help students seeking a baccalaureate degree to graduate sooner.

Since 2010, differential funds have enabled UWF to retain four faculty that would have been lost due to budget reductions and to hire an additional 37 full-time faculty for a total of 41 full-time faculty. This funding initiative has in turn enabled UWF to add/continue an estimated 287 course sections. Many of the new faculty hired are in targeted fields of critical importance to the region and state such as in STEM (Science, Technology, Engineering, and Mathematics), health professions, hospitality, and education. Any non-recurring CF funds generated from this allocation will be used to support the new faculty hired in the first year (equipment and faculty development).

3. **Create an Office of Undergraduate Research (\$45,000)** – The primary objectives of this initiative are to improve retention and graduation rates. NSSE (National Survey of Student Engagement) indicators measure the level of student engagement in high impact learning areas because these activities are shown to relate to higher levels of student success. The newly created Office of Undergraduate Research will provide enhanced opportunities for undergraduate students to participate in high-impact learning experiences through fieldwork and other applied learning activities including active, hands-on research.

As one of its unique key performance indicators, UWF has identified as a metric improvement in student engagement as measured by NSSE. Those NSSE indicators that we anticipate will be positively impacted by this funding initiative are (1) Level of Academic Challenge, (2) Active and Collaborative Learning, (3) Student-Faculty Interaction, and (4) Enriching Educational Experiences.

4. **Enhance Support for the Office of Financial Aid (\$82,466)** – The Office of Financial Aid is a “first-line” office for students seeking information on financial aid and on how to afford an education. UWF’s financial aid program is an investment in UWF’s students and their futures. This is a highly complex program which is subject to strict federal regulatory compliance and federal and state audits. Enhanced support is needed to help meet the growing needs of our students and to help ensure compliance with laws, rules, and regulations. A position will be saved utilizing these resources.
5. **Enhance Support for the Marine Services Center (\$120,000)** – The University of West Florida’s Marine Services Center (MSC) provides diving platforms, research vessels and support staff for academic programs including Marine Biology and Underwater Archaeology. The MSC has a Dive Safety Program administered by a Dive Safety Officer. This program ensures that diving required for UWF’s unique marine programs and related research is conducted in a manner that maximizes the protection of our divers from accidental injury and/or illness. Funds will be used to hire the Dive Safety Officer on permanent funding and for expenses related to the ongoing operation and maintenance of the vessels.



6. **Provide funding for the 2UWF Program (\$68,986)** – The objective of this initiative is to develop alternative methods of increasing transfer enrollment. An advisor position will be funded at Gulf Coast State College to create a seamless transition for students transferring from GCSC to UWF through institutional collaboration and tailored advising. The initiative creates a new path to earning both an associate's and a bachelor's degree and provides students with greater access to enhanced services and amenities from both institutions.

Describe the Impact to the Institution if Tuition Differential is Not Approved

Retention and graduation rates are a system-wide goal. All of these initiatives are designed to improve/increase UWF's retention and graduation rates.

In addition, UWF has experienced significant enrollment growth at a time of diminished resources. The student to faculty ratio has increased from 19:1 to 24:1 from Fall 2007 to Fall 2011 while many of our peer institutions report a ratio of 19:1. UWF is also last among its peer and aspirant institutions in the number of full time faculty. If tuition differential is not approved UWF will lag further behind on this critical measure.

Request to Modify or Waive Tuition Differential Uses

(this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14))

UWF is actively estimating and monitoring the level of Need Based Aid necessary for our students. At this time, our estimates indicate that the full 30% of differential will be necessary for financial aid awards to our students. We will continue to monitor this critical area to ensure we are fulfilling the requirements of the statute before considering any alternative uses of the 30% portion of the differential fee.



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2011-12 academic year.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Hired 21 full-time faculty.	In total, UWF has hired 41 faculty/instructor-advisors which include the 21 faculty hired in 2011-2012. If the tuition increase is approved, UWF will hire an additional 21 faculty in 2012-2013 for a grand total of 62 full time faculty paid from differential tuition.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	40
Total Number of Advisors Hired or Retained (funded by tuition differential):	1
Total Number of Course Sections Added or Saved (funded by tuition differential):	287
2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
Provide need based aid for the student body who demonstrated need based on FAFSA evaluation.	A total of 672 students benefitted.
Provide need based aid for low income, first-generation-in-college students.	Of the 672 students, 197 were first-generation-in-college students.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	672
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	\$1,240
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	\$108
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	\$2,500



ENROLLMENT PLANNING

Planned Growth by Student Type *(for E&G students at all campuses)* – **THIS DATA IS BEING REVISED**

	5 YEAR TREND (2005-06 to 2010-11)	2010-11 ACTUAL HEADCOUNT	2012-13 PLANNED HEADCOUNT	2013-14 PLANNED HEADCOUNT	3 YEAR (2014-15) PLANNED HEADCOUNT
UNDERGRADUATE					
FTIC (Regular Admit)					
FTIC (Profile Admit)					
AA Transfers*			TO BE DETERMINED		
Other Transfers					
Subtotal					
Master's					
Research Doctoral					
Professional Doctoral					
Subtotal					
NOT-DEGREE SEEKING					
MEDICAL					
TOTAL					

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

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

UWF does not systematically track hybrid/blended FTE from traditional FTE; therefore, the hybrid FTE's listed below for "10/11 Actual" are shown as 0. In 12/13, UWF will track these separately and these metrics will be adjusted accordingly in the next work plan cycle.

	5 YEAR TREND (2005-06 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	186.8%Δ	1,549	25.4%	1,636	25.12%	1,685	24.62%	1,736	23.60%
HYBRID (50%-79%)	%Δ	0	0%	45	0.69%	136	1.99%	272	3.70%
TRADITIONAL (<50%)	-1.3%Δ	4,548	74.6%	4,832	74.19%	5,022	73.39%	5,349	72.71%
TOTAL	18.5%Δ	6,097	100%	6,513	100%	6,843	100%	7,357	100%
GRADUATE									
DISTANCE (80%)	178.1%Δ	518	56.7%	577	63.20%	606	65.66%	636	67.95%
HYBRID (50%-79%)	%Δ	0	0%	4	0.44%	12	1.30%	20	2.14%
TRADITIONAL (<50%)	-12.5%Δ	396	43.3%	332	36.36%	305	33.04%	280	29.91%
TOTAL	43%Δ	914	100%	913	100%	923	100%	936	100%

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



ENROLLMENT PLANNING (continued)

Statutorily Required Enrollment Plan *(Based on State-Fundable Florida FTE)*

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
<i>Florida Resident</i>								
LOWER DIVISION	1,886	2,333	1,886	2,426	2,623	2,838	3,069	5.64%
UPPER DIVISION	3,232	3,476	3,232	3,545	3,615	3,761	3,913	2.40%
GRAD I	599	644	599	650	657	667	694	1.51%
GRAD II	54	78	54	79	80	81	84	1.49%
TOTAL	5,771	6,531	5,771	6,700	6,975	7,347	7,760	3.51%
<i>Not a Florida Resident</i>								
LOWER DIVISION	x,xxx	221	x,xxx	254	292	386	510	18.20%
UPPER DIVISION	x,xxx	265	x,xxx	288	313	372	443	10.92%
GRAD I	x,xxx	176	x,xxx	178	180	182	190	1.54%
GRAD II	x,xxx	6	x,xxx	6	6	6	6	0.00%
TOTAL	444	668	444	726	791	946	1,149	11.46%
<i>TOTAL</i>								
LOWER DIVISION	x,xxx	2,554	x,xxx	2,680	2,915	3,224	3,579	6.98%
UPPER DIVISION	x,xxx	3,741	x,xxx	3,833	3,928	4,133	4,356	3.09%
GRAD I	x,xxx	820	x,xxx	828	837	849	884	1.51%
GRAD II	x,xxx	84	x,xxx	85	86	87	90	1.39%
TOTAL	6,215	7,199	6,215	7,426	7,766	8,293	8,909	4.35%
TOTAL (US FTE)	8,287	9,599	8,287	9,901	10,355	11,057	11,879	4.35%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32.



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2012-13 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
NA						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Professional MS in Geographic Information Systems (GIS)	45.0702	STEM	FSU	Yes	150	2012-2013 (date dependent on hiring ability)
DOCTORAL PROGRAMS						
NA						

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
BS in Mechanical Engineering	14.1901	STEM	UF; UNF; USF; FAU; FSU; FIU; FAMU; UCF	No	150	2013-2014
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
MS in Robotics	14.4201	STEM	None	No	50	2014-2015
DOCTORAL PROGRAMS						
Ed.D. in Educational Technology	13.0501	Education	None	Yes	50	2013-2014
DOCTORAL PROGRAMS TO BE OFFERED AT UWF IN CONCERT WITH OTHER SUS INSTITUTIONS						
Doctor of Nursing Practice (DNP) (Coordinated with SUS partner institution)	51.3818	Critical Needs in Health Care	USF; UF; FAU; FIU; FSU; Jacksonville University; UCF; UNF; University of Miami	Will include hybrid components	TBD	2012-2013
Doctor of Physical Therapy (DPT) (Coordinated with USF)	51.2308	Critical Needs in Health Care	USF; UF; FIU; UCF; UNF; FAMU; FGCU	Will include hybrid components	36	In Process



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
Professional/Licensure Exam First-time Pass Rates Exams Above National/State Benchmark Exams Below National/State Benchmark	The number of exams with first-time pass rates above and below the national or state average, as reported in the 2010-11 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Percent of Undergraduate Seniors Participating in a Research Course	This metric represents the percentage of seniors who enrolled in a Research course during their last year. Board staff will work with University officials during the summer of 2012 to determine a system-wide definition of 'a research course'.
Operational Efficiency	
Freshman Retention Rate	The percentage of a full-time, first-time-in-college (FTIC) undergraduate cohort (entering in fall term or summer continuing to fall) that is still enrolled or has graduated from the <u>same</u> institution in the following fall term.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort. Students with unreported gender are included.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated or is still enrolled in the second or fourth academic year. Both full-time and part-time students are used in the calculation. Note: Students of degree programs longer than four years are included in the cohorts. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	The percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. Excluding students with dual majors, this metric computes total academic credit as a percentage of catalog hours required for the students major (excluding remedial coursework). For the purposes of calculating excess hours, remedial credit hours includes up to 10 foreign language credit hours that are excluded for transfer students in Florida.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees granted. Students who earn two distinct degrees in the same term are counted twice – whether their degrees are from the same six-digit CIP code or different CIP codes. Students who earn only one degree are counted once – even if they completed multiple majors or tracks.
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Graduate Degrees Awarded	This is a count of graduate degrees granted.
Percent of Graduate Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
Percent of Baccalaureate Graduates Employed in Florida	This is the percentage of baccalaureate graduates with valid social security numbers that are employed in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Percent of Baccalaureate Graduates Continuing their Education (in FL)	This is the percentage of baccalaureate graduates with valid social security numbers that are continuing their education in Florida during the Oct-Dec fiscal quarter based on FETPIP data.
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see http://mup.asu.edu/research2010.pdf
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine.
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS).



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences).
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
Percent of R&D Expenditures funded from External Sources	The percentage of total R&D expenditures that come from Federal, Private Industry and Other sources (does not include State or Institutional funds).
Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported annually to the AUTM Licensing Survey. Each agreement is counted separately.
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia.
Number of Start-up Companies	The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the AUTM Licensing Survey.
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation (see http://www.nsf.gov/statistics/nsf11313/content.cfm?pub_id=4065&id=2 , table 36 <i>minus</i> table 52).
National rank is higher than predicted by Financial Resources Ranking <i>based on US News & World Report</i>	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.