

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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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 <i>(05-06 to 10-11)</i>	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS <i>(2014-15)</i>
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
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
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
TOTAL OF IMPROVING METRICS	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

Goals Specific to Research Universities – Not Applicable

	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	%Δ	x ¹	x	x	x
National Academy Members	%Δ	x	x	x	x
Number of Post-Doctoral Appointees	%Δ	xx	xx	xx	xx
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	x	x	x	x
SUBTOTAL OF IMPROVING METRICS	x		x	x	x
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>	%Δ	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Science & Engineering Research Expenditures (\$M)	%Δ	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Percent of Research Expenditures funded from External Sources	%Δ	X%	X%	X%	X%
Patents Issued	%Δ	x	x	x	x
Licenses/Options Executed	%Δ	x	x	x	x
Licensing Income Received (\$M)	%Δ	\$ x.x	\$ x.x	\$ x.x	\$ x.x
Number of Start-up Companies	%Δ	x	x	x	x
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences	%Δ	xx	xx	xx	xx
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	%Δ	xx	xx	xx	xx
Professional Doctoral Degrees Awarded	%Δ	xx	xx	xx	xx
SUBTOTAL OF IMPROVING METRICS	x		x	x	x
TOTAL OF IMPROVING METRICS	x		x	x	x

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)
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.

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.

Faculty Practice Plans

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

Revenues Data reported at the USF System level.

**OTHER BUDGET ENTITY
TOTAL REVENUES** Data reported at the USF System level.

**UNIVERSITY REVENUES
GRAND TOTAL** Data 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	\$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

	Estimated Actual* 2011-12 -----	Estimated 2012-13 -----
University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
<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.		



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)	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 <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%)	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	N/A	%
TOTAL		%



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						
Biology	26.0101	STEM	FAMU, FAU, FGCU, FIU, UCF, UF, USF T, USF P, USF SP, UWF	No	100	Oct-2014
Operations Research & Management	52.0205	N/A	None	No	50	Oct-2014
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Audiology/Speech-Language Pathology	51.0204	Health	FAU, FIU, FSU, UCF, UF, USF T,	Yes	50	Oct-2014
Social Science Education	13.1317	N/A	FSU, USF T, UWF	No	40	Oct-2014
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.