

USF System 2016 Work Plan



University of South Florida System

University Work Plan Presentation

for Board of Governors June 2016 Meeting

BOT APPROVED 6/2/2016

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' 2025 System Strategic Plan 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. 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.

Longer-term goals 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 System, which includes USF (in Tampa), USF St. Petersburg, and USF Sarasota-Manatee, catalyzes and coordinates initiatives that prepare students for successful 21st century careers; advances research, scholarship, and creative endeavors to improve the quality of life; and engages its communities across the Tampa Bay region for mutual benefits.

VISION STATEMENT (What do you aspire to?)

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

STATEMENT OF STRATEGY (How will you get there?)

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

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

USF, in Tampa, is classified by Carnegie as a doctoral research university, highest research activity, attracting students and faculty of the highest caliber from across the world. The institution is working hard to position itself for AAU eligibility and preeminence as it maintains a commitment to student success, entrepreneurship and innovation, and global engagement.

USF St. Petersburg has developed a new strategic plan for 2014-19, which focuses on developing a distinctive identity as a valued member of the USF System, promoting faculty excellence, student success, strategic partnerships, and sustainable funding and infrastructure. The institution is now in the midst of a comprehensive implementation plan, working to bring those goals to life while maintaining positive momentum on key performance-funding metrics.

USF Sarasota-Manatee is also working toward goals as part of its strategic plan for 2015-2020. This plan focuses on enhancing student success, campus life, intentional enrollment management, high-quality teaching, community engagement and building a base of sustainable resources – all goals that will in turn help bolster the USF System's collective strengths. One such example of this is a burgeoning new partnership between USF and USF Sarasota-Manatee in engineering, where USF Sarasota-Manatee students will complete two years of pre-engineering course work on their home campus, complete an AA certificate and then transfer to the USF campus in Tampa to obtain a baccalaureate in engineering.

The USF System will seek out more of these types of programmatic partnerships among its separately accredited member institutions where it makes sense in order to serve workforce needs across the Tampa Bay region without unnecessary duplication.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

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

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

USF St. Petersburg and USF Sarasota-Manatee pride themselves on offering students an intimate campus experience and a high level of student-faculty interaction. At the same time, they benefit from associations, efficiencies of shared resources and opportunities for collaboration. Both are developing successful STEM programs that address local and statewide workforce needs and play an important role in regional economic development. At USFSP, challenges include growing needs for teaching and laboratory space as STEM programs prosper and enhancing student success to improve graduation and retention rates. For USFSM, the primary challenge is exploring ways to enhance the campus-life experience as it builds its lower-division student population.



KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

1. Continue to enhance student success to maintain momentum as a top performer in the Board of Governors performance-funding model:

Each of the USF System institutions is working toward continuous improvement in graduation and retention rates, as well as connecting students with post-graduation employment opportunities. This goal is fueled by USF System's commitment to undergraduate research and its cultivation of a global curriculum; USFSP's focus on innovative retention strategies; and USFSM's efforts to enhance its campus environment and career prep services.

2. Enhance academic program quality that prepares students for jobs:

Students who graduate from the USF System should not only graduate on time, but also well prepared for leadership jobs in the workforce. Academic quality must go hand-in-hand with all of our student success initiatives. This is being accomplished through strategic hiring of high-quality, productive faculty; support for interdisciplinary programs that expose students to critical problems of today's world and innovative solutions; and development of partnerships across the USF System and in the larger Tampa Bay community – notably in STEM fields.

3. Increase efficiencies and responsible financial practices:

Across the USF System, financial resources are more precious than ever. As a continual top performer in the Board of Governors' performance-funding model, it is vital that we continue to put our investments to good use to further improve in those key metrics. The USF System is now revisiting its own shared services among its three member institutions, with the goal of increasing efficiencies and further streamlining business services. The USF System will also continue to practice transparent budgeting and maintain its commitment to keeping costs down for students as we maximize investments in areas that support their success.



PERFORMANCE BASED FUNDING METRICS

	2015 ACTUAL	2016 ACTUAL	2017 GOALS	2018 GOALS	2019 GOALS	2020 GOALS
Percent of Bachelor's Graduates Enrolled or Employed (\$25,000+) within the U.S. One Year After Graduation	65.3% 2012-13	66.8% 2013-14	66.8% 2014-15	69.9% 2015-16	71.9% 2016-17	74.0% 2017-18
Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation	\$35,200 2012-13	\$36,300 2013-14	\$36,333 2014-15	\$36,767 2015-16	\$37,400 2016-17	\$37,933 2017-18
Cost per Bachelor's Degree Costs to the University	\$25,490 2010-14	\$26,990 2011-15	\$26,990 2012-16	\$26,990 2013-17	\$26,990 2014-18	\$26,990 2015-19
FTIC 6 year Graduation Rate * for full- and part-time students	66.1% 2008-14	67.8% 2009-15	66.7% 2010-16	69.6% 2011-17	70.9% 2012-18	73.5% 2013-19
Academic Progress Rate * FTIC 2 year Retention Rate with GPA>2	85.3% 2013-14	85.1% 2014-15	85.6% 2015-16	86.9% 2016-17	87.9% 2017-18	89.4% 2018-19
Bachelor's Degrees Awarded Within Programs of Strategic Emphasis	51.0% 2013-14	54.6% 2014-15	54.8% 2015-16	54.8% 2016-17	54.9% 2017-18	55.1% 2018-19
University Access Rate Percent of Fall Undergraduates with a Pell grant	42.1% Fall 2013	41.6% Fall 2014	40.0% Fall 2015	40.1% Fall 2016	40.1% Fall 2017	40.1% Fall 2018
Graduate Degrees Awarded Within Programs of Strategic Emphasis	69.0% 2013-14	72.7% 2014-15	74.0% 2015-16	73.8% 2016-17	73.6% 2017-18	73.2% 2018-19
BOG METRIC: Percent of Bachelor's Degrees Without Excess Hours	63.9% 2013-14	65.8% 2014-15	68.1% 2015-16	70.6% 2016-17	73.0% 2017-18	75.4% 2018-19
UBOT METRIC: Number of Post-doctoral Appointees	289 Fall 2012	321 Fall 2013	298 Fall 2014	282 Fall 2015	290 Fall 2016	297 Fall 2017

Note: Metrics are defined in appendix. For more information about the PBF model visit: http://www.flbog.edu/about/budget/performance_funding.php.

*USF System data reflect the swirl among the USF System institutions (USF, USFSP, USFSM)



PREEMINENT RESEARCH UNIVERSITY FUNDING METRICS USF-TAMPA CAMPUS ONLY

	BENCH- MARKS	2016 ACTUAL	2017 GOALS	2018 GOALS	2019 GOALS	2020 GOALS
Average GPA and SAT Score <i>for incoming freshman in Fall semester</i>	4.0 GPA 1200 SAT	4.1 1223 Fall 2015	4.0 1220 Fall 2016	4.05 1222 Fall 2017	4.075 1224 Fall 2018	4.10 1226 Fall 2019
Public University National Ranking <i>in more than one national ranking</i>	Top 50	4 2016	5 2017	5 2018	5 2019	5 2020
Freshman Retention Rate <i>Full-time, FTIC</i>	90%	88% 2014-15	90% 2015-16	91% 2016-17	92% 2017-18	93% 2018-19
6-year Graduation Rate <i>Full-time, FTIC</i>	70%	68% 2009-15	66.5% 2010-16	70.0% 2011-17	72.0% 2012-18	74.0% 2013-19
National Academy Memberships	6	8 2016	9 2017	10 2018	10 2019	10 2020
Science & Engineering Research Expenditures (\$M)	\$200 M	\$420 2014-15	\$421 2015-16	\$427 2016-17	\$434 2017-18	\$440 2018-19
Non-Medical Science & Engineering Research Expenditures (\$M)	\$150 M	\$229 2014-15	\$230 2015-16	\$233 2016-17	\$237 2017-18	\$241 2018-19
National Ranking in S.T.E.M. Research Expenditures <i>includes public & private institutions</i>	Top 100 in 5 of 8 disciplines	7 2013-14	7 2014-15	8 2015-16	8 2016-17	8 2017-18
Patents Awarded <i>over 3 year period</i>	100	297 2013-15	291 2014-16	273 2015-17	276 2016-18	279 2017-19
Doctoral Degrees Awarded Annually	400	601 2014-15	645 2015-16	650 2016-17	655 2017-18	660 2018-19
Number of Post-Doctoral Appointees	200	289 Fall 2012	321 Fall 2013	298 Fall 2014	277 Fall 2015	285 Fall 2016
Endowment Size (\$M)	\$500 M	\$417 2014-15	\$395 2015-16	\$412 2016-17	\$432 2017-18	\$448 2018-19
NUMBER OF METRICS ABOVE THE BENCHMARK		9	10	11	11	11

Note: Metrics are defined in appendix. For more information about Preeminent state research universities, see 1001.7065 Florida Statutes.



KEY PERFORMANCE INDICATORS

Teaching & Learning Metrics (from 2025 System Strategic Plan that are not included in PBF or Preeminence)

	2015 ACTUAL	2016 ACTUAL	2017 GOALS	2018 GOALS	2019 GOALS	2020 GOALS
2. Freshmen in Top 10% of Graduating High School Class	28.0% Fall 2014	30.0% Fall 2015	30.4% Fall 2016	30.6% Fall 2017	31.6% Fall 2018	31.9% Fall 2019
3. Professional Licensure & Certification Exam Pass Rates Above Benchmarks	3 of 5 2013-14	5 of 5 2014-15	6 of 6 2015-16	6 of 6 2016-17	6 of 6 2017-18	6 of 6 2018-19
4. Time to Degree <i>Mean Years for FTICs in 120hr programs</i>	4.7 2013-14	4.5 2014-15	4.5 2015-16	4.3 2016-17	4.3 2017-18	4.2 2018-19
5. Four-Year FTIC Graduation Rates <i>full- and part-time students</i>	43.0% 2010-14	48.0% 2011-15	50.4% 2012-16	53.4% 2013-17	55.8% 2014-18	57.9% 2015-19
8. Bachelor's Degrees Awarded <i>First Majors Only</i>	9,390 2013-14	9,290 2014-15	9,081 2015-16	9,225 2016-17	9,358 2017-18	9,492 2018-19
9. Graduate Degrees Awarded <i>First Majors Only</i>	3,401 2013-14	3,773 2014-15	3,877 2015-16	3,954 2016-17	4,035 2017-18	4,092 2018-19
10. Bachelor's Degrees Awarded to African-American & Hispanic Students	27.6% 2013-14	29.5% 2014-15	29.6% 2015-16	29.7% 2016-17	30.0% 2017-18	31.0% 2018-19
11. Adult (Aged 25+) Undergraduates Enrolled	24.0% Fall 2013	23.8% Fall 2014	22.9% Fall 2015	22.9% Fall 2016	21.8% Fall 2017	21.6% Fall 2018
12. Percent of Undergraduate FTE in Distance Learning Courses	23.0% 2013-14	26.0% 2014-15	27.5% 2015-16	28.2% 2016-17	28.9% 2017-18	29.6% 2018-19
16. Percent of Bachelor's Degrees in STEM & Health	34.0% 2013-14	39.0% 2014-15	40.5% 2015-16	41.3% 2016-17	42.5% 2017-18	43.5% 2018-19
18. Percent of Graduate Degrees in STEM & Health	52.0% 2013-14	57.0% 2014-15	59.6% 2015-16	60.5% 2016-17	61.5% 2017-18	62.5% 2018-19
IMPROVING METRICS		10 of 11	9 of 11	9 of 11	9 of 11	10 of 11



KEY PERFORMANCE INDICATORS (continued)

Scholarship, Research and Innovation Metrics (from the 2025 System Strategic Plan)

	2015 ACTUAL	2016 ACTUAL	2017 GOALS	2018 GOALS	2019 GOALS	2020 GOALS
20. Faculty Awards	7 2012	8 2013	7 2014	8 2015	9 2016	10 2017
22. Total Research Expenditures (\$M)	\$497 2013-14	\$494 2014-15	\$495 2015-16	\$510 2016-17	\$525 2017-18	\$541 2018-19
23. Research Expenditures Funded from External Sources	60% 2013-14	55% 2014-15	56% 2015-16	57% 2016-17	58% 2017-18	59% 2018-19
25. Licenses/Options Executed	75 2012-13	91 2013-14	119 2014-15	120 2015-16	121 2016-17	122 2017-18
26. Number of Start-up Companies Created	11 2013-14	11 2014-15	8 2015-16	9 2016-17	10 2017-18	11 2018-19
IMPROVING METRICS		2 of 5	3 of 5	5 of 5	5 of 5	5 of 5

Institution Specific Goals *(optional)*

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

See Individual USF Institution Work Plans



ENROLLMENT PLANNING

Planned Headcount Enrollment by Student Type *(for all students at all campuses)*

	FALL 2013 ACTUAL	FALL 2014 ACTUAL	FALL 2015 ACTUAL	FALL 2016 PLAN	FALL 2017 PLAN	FALL 2018 PLAN	FALL 2019 PLAN
UNDERGRADUATE							
FTIC	17,214	17,376	17,703	17,887	18,119	18,379	18,497
AA Transfers ¹	11,056	10,737	10,603	10,559	10,724	10,916	11,134
Other ²	7,738	7,693	7,683	7,934	7,909	7,879	7,776
Subtotal	36,008	35,806	35,989	36,380	36,752	37,173	37,406
GRADUATE³							
Master's	6,806	6,950	7,160	7,253	7,379	7,507	7,639
Research Doctoral	2,294	2,226	2,229	2,232	2,235	2,238	2,241
Professional Doctoral	1,220	1,379	1,309	1,239	1,241	1,244	1,246
Subtotal	10,320	10,555	10,698	10,724	10,855	10,989	11,126
UNCLASSIFIED							
H.S. Dual Enrolled	46	16	25	41	57	80	113
Other ⁴	1,941	2,201	2,272	2,282	2,333	2,385	2,438
Subtotal	1,987	2,217	2,297	2,323	2,390	2,465	2,551
TOTAL	48,315	48,578	48,984	49,426	49,997	50,628	51,083

Notes: This table reports the number of students enrolled at the university by student type categories. The determination for undergraduate, graduate and unclassified is based on the institutional class level values. Unclassified refers to a student who has not yet been formally admitted into a degree program but is enrolled. The student type for undergraduates is based on the Type of Student at Time of Most Recent Admission. The student type for graduates is based on the degree that is sought and the student CIP code. (1) Includes AA Transfers from the Florida College System. (2) Undergraduate – Other includes Post-Baccalaureates who are seeking a degree. (3) Includes Medical students. (4) Unclassified – Other includes Post-Baccalaureates who are not seeking a degree.

Planned FTE Enrollment by Method of Instruction *(for all students at all campuses)*

	2012-13 ACTUAL	2013-14 ACTUAL	2014-15 ACTUAL	2015-16 PLAN	2016-17 PLAN	2017-18 PLAN	2018-19 PLAN
UNDERGRADUATE							
Distance (80-100%)	7,804	7,867	8,745	9,413	9,725	10,047	10,381
Hybrid (50-79%)	670	580	522	235	237	240	242
Traditional (0-50%)	25,807	25,396	24,414	24,520	24,510	24,476	24,441
Subtotal	34,281	33,843	33,680	34,168	34,472	34,763	35,064
GRADUATE							
Distance (80-100%)	1,747	1,825	2,051	2,105	2,171	2,240	2,310
Hybrid (50-79%)	215	233	204	68	69	69	70
Traditional (0-50%)	6,006	6,223	6,301	6,504	6,613	6,718	6,825
Subtotal	7,968	8,282	8,555	8,677	8,853	9,027	9,205

Note: Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the standard national definition, which divides undergraduate credit hours by 30 and graduate credit hours by 24. **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** refers to primarily face to face instruction utilizing some form of technology for delivery of supplemental course materials for *no more* than 49% of instruction (per SUDS data element 2052).



ENROLLMENT PLANNING (continued)

Planned FTE Enrollment Plan by Student Level

	2014-15 ACTUAL	2015-16 ESTIMATE	2016-17 PLAN	2017-18 PLAN	2018-19 PLAN	2019-20 PLAN	2020-21 PLAN	2021-22 PLAN	Planned Annual Growth Rate*
STATE FUNDABLE									
RESIDENT									
LOWER	11,625	11,724	11,824	11,926	12,032	12,141	12,253	12,368	0.9%
UPPER	18,632	18,496	18,665	18,839	19,020	19,206	19,400	19,600	1.0%
GRAD I	4,505	4,371	4,462	4,556	4,652	4,750	4,851	4,954	2.1%
GRAD II	1,258	1,155	1,175	1,196	1,218	1,240	1,262	1,285	1.8%
TOTAL	36,019	35,745	36,126	36,518	36,922	37,337	37,766	38,208	1.1%
NON RESIDENT									
LOWER	1,181	1,424	1,431	1,438	1,444	1,451	1,459	1,466	0.5%
UPPER	1,175	1,460	1,468	1,477	1,486	1,495	1,504	1,514	0.6%
GRAD I	1,226	1,473	1,501	1,529	1,557	1,586	1,615	1,645	1.9%
GRAD II	877	926	942	959	976	994	1,012	1,030	1.8%
TOTAL	4,459	5,283	5,342	5,402	5,463	5,526	5,590	5,655	1.1%
TOTAL									
LOWER	12,806	13,149	13,268	13,390	13,506	13,592	13,711	13,834	0.8%
UPPER	19,806	19,956	20,157	20,341	20,529	20,701	20,904	21,114	0.9%
GRAD I	5,733	5,845	5,964	6,086	6,210	6,337	6,468	6,601	2.0%
GRAD II	2,133	2,079	2,116	2,154	2,193	2,232	2,272	2,313	1.8%
TOTAL	40,478	41,029	41,505	41,971	42,438	42,863	43,356	43,863	1.1%
NOT STATE FUNDABLE									
LOWER	613	631	634	616	609	602	595	588	-1.5%
UPPER	455	433	422	426	429	433	438	441	0.9%
GRAD I	665	693	705	717	731	745	758	772	1.8%
GRAD II	24	58	59	60	61	62	63	65	2.0%
TOTAL	1,757	1,815	1,820	1,818	1,830	1,843	1,854	1,866	0.5%

Note: Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the standard national definition, which divides undergraduate credit hours by 30 and graduate credit hours by 24. Note*: The Planned Annual Growth Rate is a compounded rate based on the following formula: (2021-22 value divided by the 2016-17 value) to the (1/5) exponent minus one.

Medical Student Headcount Enrollments

	2014-15 ACTUAL	2015-16 ESTIMATE	2016-17 PLAN	2017-18 PLAN	2018-19 PLAN	2019-20 PLAN	2020-21 PLAN	2021-22 PLAN	Annual Growth Rate*
MEDICAL DOCTORATES									
RESIDENT	438	430	415	415	413	406	406	406	-0.4%
NON-RESIDENT	53	74	74	74	74	74	74	74	0.0%
TOTAL	491	504	489	489	487	480	480	480	-0.4%



ACADEMIC PROGRAM COORDINATION

New Programs For Consideration by University in AY 2016-17

The S.U.S. Council of Academic Vice Presidents (CAVP) Academic Program Coordination Work Group will review these programs as part of their on-going coordination efforts. The programs listed below are based on the 2015 Work Plan list for programs under consideration for 2016-17.

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 Public Relations, Advertising, And Applied Communications (USF)	09.0900	GAP	FSU	25%	580	Fall 2016

MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
MS Public Relations, Advertising, And Applied Communications (USF)	09.0900	GAP	FSU, UNF	0%	68	Spring 2017
MS Conservation Biology (USFSP)	26.1307	STEM	UCF	0%	30	Spring 2017

DOCTORAL PROGRAMS						

New Programs For Consideration by University in 2017-19

These programs will be used in the 2017 Work Plan list for programs under consideration for 2017-18.

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						
OTD Occupational Therapy (USF)	51.2306	HEALTH	-	0%	80	TBD
PhD Pharmacy (USF)	51.2099	STEM	FAMU, UF	30%	5	TBD



STUDENT DEBT & NET COST

Student Debt Summary

	2010-11	2011-12	2012-13	2013-14	2014-15
Percent of Bachelor's Recipients with Debt	53%	57%	59%	59%	59%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$21,780	\$22,620	\$22,720	\$22,610	\$22,650
NSLDS Cohort Year	2008-11	2009-12	2010-13	2011-14	2012-15 Preliminary
Student Loan Cohort Default Rate (3rd Year)	10.1%	9.8%	7.5%	5.4%	5.2%

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2015-16)*

See Individual USF Institution Work Plans

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2015-16)*

FAMILY INCOME GROUPS	FULL-TIME RESIDENT UNDERGRADUATES HEADCOUNT	PERCENT	AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVG. GIFT AID AMOUNT	AVG. LOAN AMOUNT	
Below \$40,000	6,482	33%	\$11,308	-\$3,050	\$8,832	\$4,012	
\$40,000-\$59,999	2,313	12%	\$13,275	-\$968	\$6,779	\$3,760	
\$60,000-\$79,999	1,769	9%	\$15,448	\$1,416	\$4,507	\$4,458	
\$80,000-\$99,999	1,503	8%	\$16,477	\$2,588	\$3,364	\$4,781	
\$100,000 Above	4,413	22%	\$16,626	\$2,591	\$3,392	\$3,943	
Not Reported	3,103	16%	n/a	\$3,398	\$2,515	\$134	
TOTAL	19,583	100%	AVERAGE	\$13,925*	\$328	\$5,552	\$3,452

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2016. Please note that small changes to Spring 2016 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. 'Not Reported' represents the students who did not file a FAFSA. The bottom-line **Total/Average** represents the average of all full-time undergraduate Florida residents (note*: the total Net Cost of Attendance does not include students who did not report their family income data).



UNIVERSITY REVENUES

University Revenues *(in Millions of Dollars)*

EDUCATION & GENERAL	2014-15	2015-16
Main Operations		
State Funds	\$ 278.2	\$ 293.6
Tuition	\$ 193.1	\$ 200.3
Subtotal	\$ 471.2	\$ 493.9
Health-Science Center / Medical Schools		
State Funds	\$ 74.7	\$ 74.2
Tuition	\$ 50.6	\$ 57.7
SUBTOTAL	\$ 125.2	\$ 131.9
E&G TOTAL	\$ 596.5	\$ 625.7
OTHER BUDGET ENTITIES		
Auxiliary Enterprises	\$ 204.2	\$ 246.1
Contracts & Grants	\$ 281.3	\$ 389.2
Local Funds	\$ 435.0	\$ 482.7
Faculty Practice Plans	\$ 229.2	\$ 245.9

Note: State funds include recurring and non-recurring General Revenue funds, Lottery funds appropriated by the Florida Legislature. Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers. Source: Tables 1A & 1E of the annual Accountability Report.



UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

See Individual USF Institution Work Plans



DEFINITIONS

Performance Based Funding

Percent of Bachelor's Graduates Enrolled or Employed (\$25,000+) in the U.S. One Year After Graduation

This metric is based on the percentage of a graduating class of bachelor's degree recipients who are enrolled or employed (earning at least \$25,000) somewhere in the United States. Students who do not have valid social security numbers and are not found enrolled are excluded. Note: This data now non-Florida employment data. Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP) analysis of Wage Record Interchange System (WRIS2) and Federal Employment Data Exchange (FEDES), and National Student Clearinghouse (NSC).

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

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

Average Cost per Bachelor's Degree
Costs to the university

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

Six Year FTIC Graduation Rate

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and had graduated from the same institution within six years. Source: Accountability Report (Table 4D).

Academic Progress Rate
2nd Year Retention with GPA Above 2.0

This metric is based on the percentage of first-time-in-college (FTIC) students who started in the Fall (or summer continuing to Fall) term and were enrolled full-time in their first semester and were still enrolled in the same institution during the Fall term following their first year with had a grade point average (GPA) of at least 2.0 at the end of their first year (Fall, Spring, Summer). Source: Accountability Report (Table 4B).

University Access Rate
Percent of Undergraduates with a Pell-grant

This metric is based the number of undergraduates, enrolled during the fall term, who received a Pell-grant during the fall term. Unclassified students, who are not eligible for Pell-grants, were excluded from this metric. Source: Accountability Report (Table 3E).

Bachelor's Degrees within Programs of Strategic Emphasis

This metric is based on the number of baccalaureate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included). Source: Accountability Report (Table 4H).

Graduate Degrees within Programs of Strategic Emphasis

This metric is based on the number of graduate degrees awarded within the programs designated by the Board of Governors as 'Programs of Strategic Emphasis'. A student who has multiple majors in the subset of targeted Classification of Instruction Program codes will be counted twice (i.e., double-majors are included). Source: Accountability Report (Table 5C).



BOG Choice Metrics

Percent of Bachelor's Degrees Without Excess Hours

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

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

BOT Choice Metrics

Number of Postdoctoral Appointees
USF

This metric is based on the number of post-doctoral appointees at the beginning of the academic year. A postdoctoral researcher has recently earned a doctoral (or foreign equivalent) degree and has a temporary paid appointment to focus on specialized research/scholarship under the supervision of a senior scholar.

Source: National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).

Preeminent Research University Funding Metrics

Average GPA and SAT Score

An average weighted grade point average of 4.0 or higher and an average SAT score of 1200 or higher for fall semester incoming freshmen, as reported annually in the admissions data that universities submit to the Board of Governors. This data includes registered FTIC (student type='B','E') with an admission action of admitted or provisionally admitted ('A','P','X').

Public University National Ranking

A top-50 ranking on at least two well-known and highly respected national public university rankings, reflecting national preeminence, using most recent rankings, includes: Princeton Review, Fiske Guide, QS World University Ranking, Times Higher Education World University Ranking, Academic Ranking of World University, US News and World Report National University, US News and World Report National Public University, US News and World Report Liberal Arts Colleges, Forbes, Kiplinger, Washington Monthly Liberal Arts Colleges, Washington Monthly National University, and Center for Measuring University Performance.



Freshman Retention Rate (Full-time, FTIC)	Freshman Retention Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The retention rates that are reported in the Board's annual Accountability report are preliminary because they are based on student enrollment in their second fall term as reported by the 28th calendar day following the first day of class. When the Board of Governors reports final retention rates to IPEDS in the Spring (usually the first week of April), that data is based on the student enrollment data as reported after the Fall semester has been completed. The preliminary and final retention rates are nearly identical when rounded to the nearest whole number.
6-year Graduation Rate (Full-time, FTIC)	Cohorts are based on undergraduate students who enter the institution in the Fall term (or Summer term and continue into the Fall term). Percent Graduated is based on federal rate and does <u>not</u> include students who originally enroll as part-time students, or who transfer into the institution. This metric complies with the requirements of the federal Student Right to Know Act that requires institutions to report the completion status at 150% of normal time (or six years). For more information about how this data is calculated, see: http://www.flbog.edu/about/budget/docs/performance_funding/PBF_GRADUATION and RETENTION Methodology FINAL.pdf .
National Academy Memberships	National Academy Memberships held by faculty as reported by the Center for Measuring University Performance in the Top American Research Universities (TARU) annual report.
Science & Engineering Research Expenditures (\$M)	Science & Engineering Research Expenditures, including federal research expenditures as reported annually to the National Science Foundation (NSF).
Non-Medical Science & Engineering Research Expenditures (\$M)	Total S&E research expenditures in non-medical sciences as reported to the NSF. This removes medical sciences funds (9F & 12F in HERD survey) from the total S&E amount.
National Ranking in S.T.E.M. Research Expenditures	The NSF identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, Social Sciences). The rankings by discipline are determined by BOG staff using the NSF WebCaspar database.
Patents Awarded (3 calendar years)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent three calendar year period. Due to a year-lag in published reports, Board of Governors staff query the USPTO database with a query that only counts utility patents: "(AN/"University Name" AND ISD/yyyymmdd->yyyymmdd AND APT/1)".
Doctoral Degrees Awarded Annually	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report.
Number of Post-Doctoral Appointees	The number of Postdoctoral Appointees awarded annually, as reported in the TARU annual report. This data is based on National Science Foundation/National Institutes of Health annual Survey of Graduate Students and Postdoctorates in Science and Engineering (GSS).
Endowment Size (\$M)	This data comes from the National Association of College and University Business Officers (NACUBO) and Commonfund Institute's annual report of Market Value of Endowment Assets - which, due to timing, may release the next fiscal year's data after the Board of Governors Accountability report is published.



Key Performance Indicators	
Teaching & Learning Metrics	
Freshmen in Top 10% of HS Graduating Class	Percent of all degree-seeking, first-time, first-year (freshman) students who had high school class rank within the top 10% of their graduating high school class. As reported by the university to the Common Data Set (C10).
Professional/Licensure Exam First-time Pass Rates	The number of exams with first-time pass rates above and below the national or state average, as reported in the annual Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
Average Time to Degree Mean Years for FTIC in 120hr programs	This metric is the mean number of years between the start date (using date of most recent admission) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year.
FTIC Graduation Rates In 4 years (or less)	As reported in the annual Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees awarded as reported in the annual Accountability Report (Table 4G).
Graduate Degrees Awarded	This is a count of graduate degrees awarded as reported in the Accountability Report (Table 5B).
Bachelor's Degrees Awarded To African-American and Hispanic Students	Non-Hispanic Black and Hispanic do not include students classified as Non-Resident Alien or students with a missing race code – as reported in the Accountability Report (table 4I). 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. Percentage of Degrees is based on the number of baccalaureate degrees awarded to non-Hispanic Black and Hispanic students divided by the total degrees awarded - excluding those awarded to non-resident aliens and unreported.
Adult (Aged 25+) Undergraduates Enrolled	This metric is based on the age of the student at the time of enrollment (not upon entry). Age acts as a surrogate variable that captures a large, heterogeneous population of adult students who often have family and work responsibilities as well as other life circumstances that can interfere with successful completion of educational objectives.
Percent of Undergraduate FTE Enrolled in Online Courses	Full-time Equivalent (FTE) student is a measure of instructional activity that is based on the number of credit hours that students enroll. FTE is based on the US definition, which divides undergraduate credit hours by 30. 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.).
Percent of Bachelor's Degrees in STEM & Health	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the annual Accountability Report (Table 4H).
Percent of Graduate Degrees in STEM & Health	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the annual Accountability Report (Table 5C).



Key Performance Indicators (continued)

Scholarship, Research & Innovation Metrics

Faculty Awards	<p>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/research_data.html.</p>
Total Research Expenditures (\$M)	<p>Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).</p>
Percent of R&D Expenditures funded from External Sources	<p>This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).</p>
Licenses/Options Executed	<p>Licenses/options executed in the fiscal year for all technologies as reported in the annual Accountability Report (table 6A).</p>
Number of Start-up Companies	<p>The number of start-up companies that were dependent upon the licensing of University technology for initiation as reported in the annual Accountability Report (table 6A).</p>



Student Debt Summary

Percent of Bachelor’s Recipients with Debt

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

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

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

Student Loan Cohort Default Rate (3rd Year)

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

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