

UF

2012-13 Work Plan



University of 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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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.

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.

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

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 Rates²					
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 <i>(based on 8 broad discipline areas, and includes private universities)</i>	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) <i>(includes non-Science & Engineering disciplines)</i>	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 <i>(based on U.S. News & World Report)</i>	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	\$ 279.7
TOTAL MAIN OPERATIONS	\$ 595.9	\$ 581.4	\$ 565.3	\$ 603.3	\$ 551.0	\$ 516.8
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	\$ 37.6
TOTAL HSC	\$ 121.3	\$ 124.4	\$ 133.5	\$ 142.6	\$ 137.1	\$ 130.6
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	\$783.4

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	\$1,325	\$1,989	\$2,752
Percent Increase	15%	15%	9%	15%	15%
Required Fees¹	\$1,514	\$1,597	\$1,718	\$1,848	\$1,964
TOTAL TUITION AND FEES	\$5,044	\$5,657	\$6,143	\$6,936	\$7,815

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):	9%
\$ Increase in tuition differential per credit hour:	\$12.17
\$ Increase in tuition differential for 30 credit hours:	\$365.10
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	\$7,678,242
Total differential fee revenue generated in 2012-13 (projected):	\$27,548,030
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	
UF would need to take additional recurring cuts in the amount of tuition differential. This would result in fewer class instructors, decreased availability of class sections, increased section sizes and decreased student advising. These cuts would impede student progress to graduation, further deteriorate the student-faculty ratio, hobble the university's efforts to place increased emphasis on STEM education, and perhaps increase the financial burden on students who might need to spend additional time at UF to complete their degree programs.	
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	Estimated Actual*	Estimated
Budget Entity: 48900100 (Educational & General)	2011-12	2012-13
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)	-----	-----
<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	\$ 27,548,030
Interest Revenue - Current Year		
Interest Revenue - From Carryforward Balance		
Total Receipts / Revenues:	\$ 18,728,074	\$ 27,548,030
<u>Expenditures</u>		
Salaries & Benefits	\$ 9,875,732	\$ 21,104,621
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	\$ 30,059,043
Ending Balance Available:	\$ 4,903,101	\$ 2,392,088

*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:							
Undergraduate Students	-----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	\$44.17	\$66.29	\$91.73	\$120.98
Total Base Tuition & Differential per Credit Hour	\$102.33	\$117.67	\$135.32	\$147.49	\$169.61	\$195.05	\$224.30
% Change		15.0%	15.0%	9.0%	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	\$10.36	\$10.36
Activity & Service	\$10.65	\$13.94	\$14.55	\$16.06	\$16.86	\$17.70	\$18.58
Health	\$10.49	\$12.99	\$13.82	\$13.82	\$14.51	\$15.23	\$15.99
Athletic	\$1.90	\$1.90	\$1.90	\$1.90	\$1.90	\$1.90	\$1.90
Transportation Access	\$6.79	\$7.33	\$7.88	\$8.41	\$9.25	\$9.94	\$10.73
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	\$43.43	\$50.48	\$53.23	\$57.27	\$61.60	\$65.45	\$67.88
Total Tuition and Fees per Credit Hour	\$145.76	\$168.15	\$188.55	\$204.76	\$231.21	\$260.50	\$292.18
% Change		15.4%	12.1%	8.6%	12.9%	12.7%	12.2%
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	\$3,069.90	\$3,530.10	\$4,059.60	\$4,424.70	\$5,088.30	\$5,851.50	\$6,729.00
Total Fees for 30 Credit Hours	\$1,302.90	\$1,514.40	\$1,596.90	\$1,718.10	\$1,848.00	\$1,963.50	\$2,036.40
Total Tuition and Fees for 30 Credit Hours	\$4,372.80	\$5,044.50	\$5,656.50	\$6,142.80	\$6,936.30	\$7,815.00	\$8,765.40
\$ Change		\$671.70	\$612.00	\$486.30	\$793.50	\$878.70	\$950.40
% Change		15.4%	12.1%	8.6%	12.9%	12.7%	12.2%
Out-of-State Fees							
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	\$4,424.70	\$5,088.30	\$5,851.50	\$6,729.00
Total Fees for 30 Credit Hours	\$20,674.20	\$23,791.50	\$23,874.00	\$23,995.20	\$24,125.10	\$24,240.60	\$24,313.50
Total Tuition and Fees for 30 Credit Hours	\$23,744.10	\$27,321.60	\$27,933.60	\$28,419.90	\$29,213.40	\$30,092.10	\$31,042.50
\$ Change		\$3,577.50	\$612.00	\$486.30	\$793.50	\$878.70	\$950.40
% Change		15.1%	2.2%	1.7%	2.8%	3.0%	3.2%
Housing/Dining⁴							
	\$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 <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.