USF System 2014-15 Work Plan

University of South Florida System

Work Plan Presentation for 2014-15 Board of Governors Review

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

INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2014-15 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.

TABLE OF CONTENTS

MISSION STATEMENT (What is your purpose?)

The University of South Florida System, which includes the research-intensive USF Tampa, USF St Petersburg, and USF Sarasota-Manatee, catalyzes and coordinates initiatives that develop graduates for 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 unite its institutions into a system that is nationally recognized for innovation in teaching and research, for attracting outstanding and diverse scholars, staff, and students, and for leveraging its institutions' strengths to make a positive impact on the Tampa Bay region and beyond.

STATEMENT OF STRATEGY (How will you get there?)

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

The 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 and preeminence metrics. Engaging in partnerships represents another important strategy; USF and USF St Petersburg are both recognized by the Carnegie Foundation as community engaged universities.

USF, the doctoral research campus in Tampa, is classified by Carnegie as a very high research university, attracting students and faculty of the highest caliber from across the world. The institution is working hard to position itself for AAU eligibility as it maintains a commitment to student success, entrepreneurship and innovation, and global engagement. USF's strategy is rooted in accountability: setting clear goals and constantly monitoring progress.

USF St Petersburg is developing a new strategic plan for 2014-19, which will focus on faculty research and scholarship, student performance and strategic partnerships at the local, regional and global levels. Success will be continually monitored using metrics such as students' academic performance, faculty excellence, graduation and retention rates, employment rates and external funding.

USF Sarasota-Manatee's strategy focuses on developing partnerships with the Florida College System, expanding lower-level coursework, and growing degree programs to meet local and state needs. Targeted students include FCS transfers, returning adult students and local high school graduates who

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 distinctive and complementary member institutions. They include: high-impact scholarship and research; excellence in teaching and learning; entrepreneurial spirit, partnerships and innovation; focus on accountability and data driven decision making; community engagement and public service. 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 the main USF doctoral research campus include maintaining current 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. Furthermore, reduced federal research funds may impact future research opportunities. Despite those 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.

The regional institutions, 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 brand 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 keep students engaged on campus without on-campus housing options.

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 improve student success, particularly in the areas of retention and graduation, by strategic reallocation of resources. Initiatives include enhancing academic advising; building on-campus housing; improving and expanding facilities such as classrooms, laboratories, studios, and libraries; enhancing the technology infrastructure; reinventing the organizational structure; infusing a global focus into the curriculum; expanding online learning; and enhancing internship opportunities and career services. The USF System is also working together in this realm with the University of Central Florida and Florida International University to share best student success practices and leverage the unique strengths as large, diverse, metropolitan universities. The universities have already jointly developed several strategies for improving the graduation rates, retention rates, and academic success of their unique metropolitan student populations by sharing knowledge, software and processes. They have also begun developing a shared database for student internship or job opportunities that may exist in Tampa, Orlando and Miami.

2. Build high-impact research and innovation and enhance academic program quality through strategic hiring of research-productive faculty; support for interdisciplinary initiatives that address critical problems, such as USF's focus on cybersecurity, which draws from the Colleges of Arts and Sciences, Behavioral and Community Sciences, Business, Education, Engineering, Global Sustainability, Public Health, the Office of Research and Innovation, and the Center for Urban Transportation; and development of local and global partnerships. Support innovators among both faculty and students and facilitate enhancement of the student experience through increased opportunities for faculty mentorship.

3. Implement fiscal management practices that increase transparency, such as a recent transition toward responsibility-centered budgeting, maximize efficiencies through shared services across the USF System, and encourage prudent use of resources. Apply strategic resource reallocations to support identified priorities related to student success, faculty research and innovation, infrastructure improvement, etc.

PERFORMANCE FUNDING METRICS

Each university is required to complete the table below, providing their goals for the metrics used in the Performance Based Funding model that the Board of Governors approved at its January 2014 meeting. The Board of Governors will consider the shaded 2014-15 goals for approval.

	ONE-YEAR TREND	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
Metrics Common To All Universities						
Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in the U.S. One Year After Graduation	0%Δ	69%	72%	73%	74%	74%
Median Wages of Bachelor's Graduates Employed Full-time in Florida One-Year After Graduation	4%Δ	$34,600	$34,730	$35,191	$35,659	$36,133
Average Cost per Bachelor's Degree [Instructional Costs to the University]	5%Δ	$24,340	$24,583	$24,829	$25,078	$25,328
FTIC 6 year Graduation Rate [Includes full- and part-time students]	7%Δ	61%	63%	65%	61%	66%
Academic Progress Rate [FTIC 2 year Retention Rate with GPA>2]	1%Δ	86%	87%	87%	88%	89%
University Access Rate [Percent of Fall Undergraduates with a Pell grant]	0%Δ	41%	41%	41%	41%	41%
Bachelor's Degrees Awarded Within Programs of Strategic Emphasis [Based on list approved by BOG at 11/2013 meeting]	1%Δ	50%	50%	51%	52%	53%
Graduate Degrees Awarded Within Programs of Strategic Emphasis [Based on list approved by BOG at 11/2013 meeting]	2%Δ	67%	67%	68%	69%	70%
Board of Governors Choice Metric						
Percent of Bachelor's Degrees Without Excess Hours	n/a	52%	54%	56%	58%	60%
Board of Trustees Choice Metric						
Number of Post-doctoral Appointees	-4%Δ	289	320	330	335	340

Note: Metrics are defined in appendix.

PREEMINENT RESEARCH UNIVERSITY FUNDING METRICS

The Board of Governors shall designate each state research university that meets at least 11 of the 12 following academic and research excellence standards as a preeminent state research university. For this year, the University of Florida and Florida State University are the only universities required to complete the table below. The Board of Governors will consider the shaded 2014 actual data for approval.

REPORTED FOR USF TAMPA ONLY

University of South Florida (Carnegie RU/VH)	BENCH-MARKS	2014 ACTUAL	2015 GOALS	2016 GOALS	2017 GOALS	2018 GOALS
Average GPA and SAT Score for incoming freshman in Fall semester	4.0 GPA 1800 SAT	Fall 2013 4.0/1772	Fall 2014 4.05/1780	Fall 2015 4.05/1800	Fall 2016 4.075/1803	Fall 2017 4.1/1806
Public University National Ranking (in more than one national ranking)	**Top 50**	4/2014 1	4/2015 1	4/2016 2	4/2017 2	4/2018 2
Freshman Retention Rate (Full-time, FTIC)	**90%**	2011-12 87%	2012-13 89%	2013-14 90%	2014-15 91%	2015-16 92%
6-year Graduation Rate (Full-time, FTIC)	**70%**	2007-13 63%	2008-14 65%	2009-15 68%	2010-16 63%	2011-17 70%
National Academy Memberships	**6**	2011 3	2012 3	2013 4	2014 5	2015 6
Total Annual Research Expenditures ($M) (Science & Engineering only)	**$200 M**	2012-14 $410 M	2013-14 $414 M	2014-15 $418 M	2015-16 $422 M	2016-17 $426 M
Total Annual Research Expenditures in Diversified Non-Medical Sciences ($M) (Science & Engineering only)	**$150 M**	2012-13 $192 M	2013-14 $194 M	2014-15 $196 M	2015-16 $198 M	2016-17 $200 M
National Ranking in S.T.E.M. Research Expenditures (includes public & private institutions)	**Top 100** in 5 of 8 disciplines	2011-12 5	2012-13 7	2013-14 7	2014-15 8	2015-16 8
Patents Awarded (over 3 year period)	**100**	2011-13 265	2012-14 251	2013-15 231	2014-16 234	2015-17 237
Doctoral Degrees Awarded Annually (Does not include Professional degrees)	**400**	2012-13 295	2013-14 315	2014-15 330	2015-16 340	2016-17 350
Number of Post-Doctoral Appointees	**200**	Fall 2010 293	Fall 2011 300	Fall 2012 289	Fall 2013 322	Fall 2014 330
Endowment Size ($M)	**$500 M**	2012-13 $364 M	2013-14 $390 M	2014-15 $420 M	2015-16 $450 M	2016-17 $485 M
NUMBER OF METRICS ABOVE THE BENCHMARK	11 of 12	5	5	8	8	10

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

The Board of Governors will consider the shaded 2014-15 goals for approval.

Goals Common to All Universities

Academic Quality

National Ranking for University and Programs

USF will (a) Educate competitive, highly-skilled students ready to enter the workforce (including investment in STEM and ranked programs, such as in the growing field of cybersecurity); (b) Engage in high impact research and innovation to improve health and foster positive societal change; and (c) Establish partnerships to enhance student access to academic programs and research to build a strong, sustainable future for Florida in a global economy.

	TREND *(2008-09 to 2012-13)*	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
SAT Score [for 3 subtests]	5%Δ	1759	1760	1760	1765	1770
High School GPA	6%Δ	3.89	4.00	4.00	4.00	4.00
Professional/Licensure Exam First-time Pass Rates[1]						
Exams Above Benchmarks	n/a	5	4	5	6	6
Exams Below Benchmarks	n/a	0	1	0	0	0
Operational Efficiency						
Freshman Retention Rate	1%Δ	87%	88%	88%	89%	90%
FTIC Graduation Rates						
In 4 years (or less)	17%Δ	40%	41%	43%	45%	46%
In 6 years (or less)	16%Δ	61%	63%	65%	64%	66%
AA Transfer Graduation Rates						
In 2 years (or less)	1%Δ	27%	28%	29%	30%	31%
In 4 years (or less)	6%Δ	66%	67%	68%	69%	70%
Average Time to Degree (for FTIC)	2%Δ	5.1 yrs	5.1 yrs	5.0 yrs	5.0 yrs	5.0 yrs
Return on Investment						
Bachelor's Degrees Awarded	19%Δ	8,999	9,269	9,400	9,600	9,800
Percent of Bachelor's Degrees in STEM	5%Δ	23%	25%	27%	28%	30%
Graduate Degrees Awarded	11%Δ	3,209	3,300	3,400	3,500	3,600
Percent of Graduate Degrees in STEM	8%Δ	26%	26%	27%	28%	28%
Annual Gifts Received ($M)	7%Δ	$ 36.5 M	$ 38.0 M	$ 40.0 M	$ 42.0 M	$ 44.0 M
Endowment ($M)	32%Δ	$ 363.9 M	$ 390.0 M	$ 420.0 M	$ 450.0 M	$ 485.0 M

Notes: (1) Professional licensure pass rates are based on the 2012-13 Annual Accountability Report with data that spans multiple time periods, (2) The methodology for calculating the percent of undergraduate seniors participating in a research course will be determined during the 2014 summer.

KEY PERFORMANCE INDICATORS

The Board of Governors will consider the shaded 2014-15 goals for approval.

Goals Specific to Research Universities

	TREND *(2008-09 to 2012-13)*	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
Academic Quality						
Faculty Awards	-13%Δ	7	8	9	10	11
National Academy Members	0%Δ	3	4	5	6	7
Number of Post-Doctoral Appointees*	25%Δ	289	320	330	335	340
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures*	n/a	7 of 8	7 of 8	8 of 8	8 of 8	8 of 8
Return on Investment						
Total Research Expenditures ($M) [includes non-Science & Engineering disciplines]	16%Δ	$ 467 M	$ 472 M	$ 477 M	$ 482 M	$ 487 M
Science & Engineering Research Expenditures ($M)	19%Δ	$ 411 M	$ 415 M	$ 419 M	$ 423 M	$ 427 M
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences ($M)	41%Δ	$ 193 M	$ 195 M	$ 197 M	$ 199 M	$ 201 M
Percent of Research Expenditures funded from External Sources	-14%Δ	64%	63%	62%	61%	60%
Patents Issued	171%Δ	76	77	78	79	80
Licenses/Options Executed	200%Δ	75	76	77	78	79
Licensing Income Received ($M)	38%Δ	$ 1.8 M	$ 1.5 M	$ 1.6 M	$ 1.7 M	$ 1.8 M
Number of Start-up Companies	200%Δ	9	8	8	9	9
National Rank is Higher than Predicted by the Financial Resources Ranking [based on U.S. News & World Report]	n/a	170/168	n/a	n/a	n/a	n/a
Research Doctoral Degrees Awarded	19%Δ	295	315	330	340	350
Professional Doctoral Degrees Awarded	-1%Δ	153	235	265	330	282
TOTAL NUMBER OF IMPROVING METRICS		**9**	**11**	**13**	**13**	**13**

Note: An asterisk (*) indicates that 2011-12 is the latest data available for these metrics.

KEY PERFORMANCE INDICATORS

Institution Specific Goals

Each university will provide updates for the metric goals reported in last year's Work Plans. The Board of Governors will consider the shaded 2014-15 goals for approval. University leadership will need to discuss any proposed changes with Board of Governors staff.

SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS

FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2013-14 Actual	2014-15 Appropriations
Education & General – Main Operations		
State Funds *	$240.4	$274.9
Tuition	$194.6	$222.1
TOTAL MAIN OPERATIONS	$ 435.0	$497.1
Education & General – Health-Science Center / Medical Schools		
State Funds	$71.8	$74.4
Tuition	$53.2	$56.7
TOTAL HSC	$125.0	$131.1
EDUCATION & GENERAL TOTAL REVENUES	$560.0	$628.2

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 2013-14 year.

**The 2014-15 appropriations data includes the funds associated with the Performance Based Funding model, which is contingent upon approval by the Board of Governors at their June Board meeting. The entire USF System allocation is included in the Main Operations, State Funds line – allocation to the USF System Budget Entities has not yet been determined.*

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	$187.3	n/a
Contracts & Grants Resources received from federal, state or private sources for the purposes of conducting research and public service activities.		
Revenues	$376.4	n/a
Local Funds Resources associated with student activity (supported by the student activity fee), student financial aid, concessions, intercollegiate athletics, technology fee, green fee, and student life & services fee.		
Revenues	$444.5	n/a
Faculty Practice Plans Revenues/receipts are funds generated from faculty practice plan activities.		
Revenues	$210.4	n/a
OTHER BUDGET ENTITY TOTAL REVENUES	$1,218.6	n/a
UNIVERSITY REVENUES GRAND TOTAL	$1,778.6	n/a

FISCAL INFORMATION (continued)

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

	FY 2012-13 ACTUAL	FY 2013-14 ACTUAL	FY 2014-15 REQUEST	FY 2015-16 PLANNED	FY 2016-17 PLANNED
Base Tuition					
Tuition Differential Fee					
Percent Increase					
Required Fees[1]					
TOTAL TUITION AND FEES					

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

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

Student Debt Summary

	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ACTUAL	2014-15 GOAL
Percent of Bachelor's Recipients with Debt	52%	53%	57%	59%	59%
Average Amount of Debt *for Bachelor's who have graduated with debt*	$21,811	$21,784	$22,623	$22,719	$22,700
NSLDS Cohort Year	2008	2009	2010	2011	2012 Goal
Student Loan Cohort Default Rate (3rd Year)	8.1% trial	10.1%	9.8%	7.5% *draft*	7.0%

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS	$6,410	$1,000	$9,250	$1,600	$2,500	$20,760
AT HOME	$6,410	$1,000	$4,620	$1,600	$2,500	$16,130

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2013-14)*

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	7,314	36%		$11,383	-$2,720	$8,556	$4,180
$40,000-$59,999	2,520	13%		$13,271	-$544	$6,489	$3,635
$60,000-$79,999	1,910	10%		$15,502	$1,960	$4,022	$4,397
$80,000-$99,999	1,626	8%		$16,324	$2,729	$3,267	$4,254
$100,000 Above	4,834	24%		$16,515	$2,911	$3,110	$3,114
Missing*	1,805	9%		n/a	$4,629	$1,281	$162
TOTAL	20,009	100%	AVERAGE	$14,221*	$484	$5,461	$3,518

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2014. Please note that small changes to Spring 2013 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 (note*: the total Net Cost of Attendance does not include students with missing family income data). 'Missing' includes students who did not file a FAFSA.

FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2014

SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS

FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS

FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES, & AVAILABLE BALANCES - FISCAL YEAR 2013-14 AND 2014-15

SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS

FISCAL INFORMATION (continued)
UNIVERSITY TUITION, FEES AND HOUSING PROJECTIONS

SEE INDIVIDUAL USF SYSTEM INSTITUTION WORK PLANS

ENROLLMENT PLANNING

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

	5 YEAR TREND *(2008-13)*	Fall 2013 ACTUAL HEADCOUNT		Fall 2014 PLANNED HEADCOUNT		Fall 2015 PLANNED HEADCOUNT		Fall 2016 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	1%Δ	17,041	*47%*	17,030	*49%*	17,226	*49%*	17,423	*50%*
FTIC (Profile Admit)	-56%Δ	154	*0%*	135	*0%*	128	*0%*	110	*0%*
AA Transfers*	17%Δ	12,489	*35%*	12,043	*34%*	11,969	*34%*	11,697	*34%*
Other Transfers	-13%Δ	6,326	*18%*	5,812	*17%*	5,708	*16%*	5,541	*16%*
Subtotal	**3%Δ**	**36,010**	***100%***	**35,020**	***100%***	**35,031**	***100%***	**34,771**	***100%***
GRADUATE STUDENTS									
Master's	4%Δ	6,806	*69%*	7,002	*70%*	7,105	*70%*	7,179	*70%*
Research Doctoral	12%Δ	2,294	*23%*	2,340	*24%*	2,375	*23%*	2,400	*23%*
Professional Doctoral	554%Δ	739	*8%*	600	*6%*	700	*7%*	700	*7%*
Subtotal	**13%Δ**	**9,839**	***100%***	**9,942**	***100%***	**10,180**	***100%***	**10,279**	***100%***
NOT-DEGREE SEEKING	**-4%Δ**	**1,984**		**2,132**		**2,138**		**2,144**	
MEDICAL	**5%Δ**	**496**		**496**		**496**		**496**	
TOTAL	**4%Δ**	**48,329**		**47,590**		**47,845**		**47,690**	

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

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

	2 YEAR TREND *(2010-11 to 2012-13)*	2012-13 ACTUAL FTE	% of TOTAL	2014-15 PLANNED FTE	% of TOTAL	2015-16 PLANNED FTE	% of TOTAL	2016-17 PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	11%Δ	5,072	*21%*	5,617	*22%*	5,687	*23%*	5,748	*23%*
HYBRID (50%-79%)	13%Δ	382	*2%*	743	*3%*	859	*3%*	878	*100%*
TRADITIONAL (<50%)	-2%Δ	18,776	*77%*	18,800	*75%*	18,764	*74%*	18,854	*74%*
TOTAL	**1%Δ**	**24,230**	***100%***	**25,160**	***100%***	**25,310**	***100%***	**25,480**	***100%***
GRADUATE									
DISTANCE (80%)	-2%Δ	1,116	*20%*	1,300	*22%*	1,472	*23%*	1,476	*23%*
HYBRID (50%-79%)	1%Δ	110	*2%*	190	*3%*	219	*3%*	221	*3%*
TRADITIONAL (<50%)	-1%Δ	4,268	*78%*	4,491	*75%*	4,783	*74%*	4,793	*74%*
TOTAL	**-1%Δ**	**5,494**	***100%***	**5,981**	***100%***	**6,474**	***100%***	**6,490**	***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)

Planned Enrollment Plan by Residency and Student Level *(Florida FTE)*

	Estimated Actual 2013-14	Funded 2014-15	Planned 2014-15	Planned 2015-16	Planned 2016-17	Planned 2017-18	Planned 2018-19	Planned 2019-20	Planned Annual Growth Rate*
STATE FUNDABLE									
Florida Resident									
LOWER	8721	9274	8671	8694	8852	9021	9135	9252	1%
UPPER	13821	12283	13510	13251	12966	12816	13024	13239	0%
GRAD I	3222	3081	3234	3310	3440	3524	3651	3783	3%
GRAD II	918	623	998	1067	1167	1254	1299	1346	6%
TOTAL	26,681	25,261	26,414	26,322	26,425	26,615	27,109	27,619	1%
Non- Resident									
LOWER	819	n/a	1031	1244	1266	1288	1301	1315	5%
UPPER	687	n/a	772	853	832	817	827	838	2%
GRAD I	760	n/a	901	1077	1120	1145	1186	1228	7%
GRAD II	664	n/a	780	900	984	1058	1096	1136	8%
TOTAL	2,930	1,302	3,484	4,074	4,201	4,309	4,410	4,517	6%
TOTAL									
LOWER	9540	9274	9702	9938	10118	10309	10436	10567	2%
UPPER	14507	12283	14282	14104	13798	13633	13851	14076	0%
GRAD I	3982	3081	4135	4387	4560	4669	4837	5011	4%
GRAD II	1582	623	1778	1967	2151	2312	2395	2482	7%
TOTAL	29,611	26,563	29,898	30,396	30,627	30,923	31,519	32,135	2%
NOT STATE FUNDABLE									
LOWER	701	n/a	728	755	783	813	843	875	4%
UPPER	918	n/a	952	987	1,023	1,060	1,099	1,140	4%
GRAD I	387	n/a	402	418	434	450	467	486	4%
GRAD II	7	n/a	7	8	8	8	9	9	5%
TOTAL	2,014	n/a	2,088	2,168	2,248	2,330	2,418	2,509	4%

Note: Full-time Equivalent (FTE) student is a measure of instructional effort (and student activity) that is based on the number of credit hours that students enroll. FTE is based on the Florida definition, which divides undergraduate credit hours by 40 and graduate credit hours by 32. Note*:The average annual growth rate is based on the annual growth rate from 2014-15 to 2019-20.

Medical Student Headcount Enrollments

Medical Doctorate Headcounts									
RESIDENT	468	480	480	480	480	480	480	480	0%
NON-RESIDENT	16	0	16	16	16	16	16	16	0%
TOTAL	496	480	496	496	496	496	496	496	0%

ACADEMIC PROGRAM COORDINATION

New Programs For Consideration by University in AY 2014-15

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 2013-14 Work Plan list for programs under consideration for 2014-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT *in 5th year*	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
Master of Pharmacy (USF)	51.2099	STEM	FAMU, UF	80% online	100	Fall 2014
MS in Nurse Anesthesia (USF)	51.3804		FIU		35	Fall 2015
MS in Health Systems Engineering (USF)	14.2701	STEM	UF		40	Fall 2015
Master of Accountancy (USFSP)	52.0301	Critical Workforce Gap Analysis	UF, FSU, FAU, FIU, UCF, UNF	No	45	September 2014
DOCTORAL PROGRAMS						

New Programs For Consideration by University in 2015-17

These programs will be used in the 2015-16 Work Plan list for programs under consideration for 2015-16.

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT *in 5th year*	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
Data Analytics (USFSP)	52.1301	Economic Development--STEM		UF		March 2016
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
DOCTORAL PROGRAMS						
Ph.D. in Global Sustainability (USF)	30.3301	STEM		Hybrid	24	Fall 2016

DEFINITIONS

Performance Based Funding	
Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education 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 employed full-time in Florida or continuing their education somewhere in the United States. Students who do not have valid social security numbers are excluded. Note: Board staff have been in discussions with the Department of Economic Opportunity staff about the possibility of adding non-Florida employment data (from Wage Record Interchange System (WRIS2) to this metric for future evaluation. Sources: State University Database System (SUDS), Florida Education & Training Placement Information Program (FETPIP), National Student Clearinghouse.
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 *Instructional costs to the university*	For each of the last four years of data, the annual total undergraduate instructional 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 (2009-10 through 2012-13).
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. Students of degree programs longer than four years (eg, PharmD) are included in the cohorts. Students who are active duty military are not included in the data. Source: State University Database System (SUDS).
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: State University Database System (SUDS).
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: State University Database System (SUDS).
Bachelor's Degrees Awarded within Programs of Strategic Emphasis (includes STEM)	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: State University Database System (SUDS).
Graduate Degrees Awarded within Programs of Strategic Emphasis (includes STEM)	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: State University Database System (SUDS).

Freshmen in Top 10% of High School Class Applies to: NCF	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. Source: New College of Florida.
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 for transfer students in Florida, 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).
Number of Faculty Awards	This metric is based on the number of awards that faculty have earned in the arts, humanities, science, engineering and health fields as reported in the annual 'Top American Research Universities' report. Twenty-three of the most prominent awards are considered, including: Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, MacArthur Foundation Fellows, National Endowment for the Humanities (NEH) Fellows, National Medal of Science and National Medal of Technology, Robert Wood Johnson Policy Fellows, Sloan Research Fellows, Woodrow Wilson Fellows, to name a few awards. Source: Center for Measuring University Performance, Annual Report of the Top American Research Universities (TARU).
National Ranking for Institutional & Program Achievements	This metric is based on the number of Top 50 university rankings that NCF earned from the following list of publications: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities. Source: Board of Governors staff review.
BOT Choice Metrics	
Percent of R&D Expenditures Funded from External Sources FAMU	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).
Bachelor's Degrees Awarded to Minorities FAU, FGCU, FIU	This metric is the number, or percentage, of baccalaureate degrees granted in an academic year to Non-Hispanic Black and Hispanic students. This metric does not include students classified as Non-Resident Alien or students with a missing race code. Source: State University Database System (SUDS).
National Rank Higher than Predicted by the Financial Resources Ranking Based on U.S. and World News FSU	This metric is based on the difference between the Financial Resources rank and the overall University rank. U.S. News measures financial resources by using a two-year average spending per student on instruction, research, student services and related educational expenditures - spending on sports, dorms and hospitals doesn't count. Source: US News and World Report's annual National University rankings.

Percent of Undergraduate Seniors Participating in a Research Course NCF	This metric is based on the percentage of undergraduate seniors who participate in a research course during their senior year. Source: New College of Florida.
Number of Bachelor Degrees Awarded Annually UCF	This metric is the number of baccalaureate degrees granted in an academic year. Students who earned two distinct degrees in the same academic year were counted twice; students who completed multiple majors or tracks were only counted once. Source: State University Database System (SUDS).
Total Research Expenditures UF	This metric is the total expenditures (includes non-science & engineering fields) for research & development activities within a given fiscal year. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
Percent of Course Sections Offered via Distance and Blended Learning UNF	This metric is based on the percentage of course sections classified as having at least 50% of the instruction delivered using some form of technology, when the student and instructor are separated by time or space, or both. Source: State University Database System (SUDS).
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).
Percentage of Adult Undergraduates Enrolled UWF	This metric is based on the percentage of undergraduates (enrolled during the fall term) who are at least 25 years old at the time of admission. This includes undergraduates who are not degree-seeking, or unclassified. Source: State University Database System (SUDS).

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 1800 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. Legislative staff based their initial evaluation on the following list: US News and World Report, Forbes, Kiplinger, Washington Monthly, Center for Measuring University Performance, Times Higher Education World University Rankings, QS World University Ranking, and the Academic Ranking of World Universities.
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)	6-year Graduation Rate (Full-time, FTIC) as reported annually to the Integrated Postsecondary Education Data System (IPEDS). The Board of Governors reports the preliminary graduation rates in the annual Accountability report, and 'final' graduation rates to IPEDS in the beginning of February. The final rates are usually the same as the preliminary rates but can be slightly higher (1%-2% points) due to cohort adjustments for specific, and rare, exemptions allowed by IPEDS.

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.
Total Annual Research Expenditures ($M) (Science & Engineering only)	Total Science & Engineering Research Expenditures, including federal research expenditures, of $200 million or more, as reported annually by the National Science Foundation (NSF).
Total Annual Research Expenditures in Diversified Non-Medical Sciences ($M) (Science & Engineering only)	Total S&E research expenditures in non-medical sciences as reported by 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 (over 3 year period)	Total patents awarded by the United States Patent and Trademark Office (USPTO) for the most recent 3-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/20100101->20131231 AND APT/1)".
Doctoral Degrees Awarded Annually	Doctoral degrees awarded annually, as reported annually in the Board of Governors Accountability Report. Note: per legislative workpapers, this metric does not include Professional degrees.
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.

Goals Common to All Universities	
Academic Quality	
Avg. SAT Score (for 3 subtests)	An average weighted grade point average of 4.0 or higher and an average SAT score of 1800 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').
Avg. HS GPA	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
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 2012-13 Accountability report, including: Nursing, Law, Medicine (3 subtests), Veterinary, Pharmacy, Dental (2 subtests), Physical Therapy, and Occupational Therapy.
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 same institution in the following fall term as reported in the 2012-13 Accountability report (table 4B) – see link.
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	As reported in the 2012-13 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 same institution by the fourth or sixth 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.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	As reported in the 2012-13 Accountability report (table 4E), 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 from or is still enrolled in the same institution by the second or 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.
Average Time to Degree (for FTIC)	This metric is the 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.
Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees awarded as reported in the 2012-13 Accountability Report (table 4G).
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 as reported in the 2012-13 Accountability Report (table 4H).
Graduate Degrees Awarded	This is a count of graduate degrees awarded as reported in the 2012-13 Accountability Report (table 5B).
Percent of Graduate Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2012-13 Accountability Report (table 5C).
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. As reported by the Top American Research Universities – see link.
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) – see link.
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). Historically NSF provided these rankings (see tables 45-61 at link), but now data must be queried via WebCASPAR – see link.
Return on Investment	
Total Research Expenditures ($M)	Total expenditures for all research activities (including non-science and engineering activities) as reported in the National Science Foundation annual survey of Higher Education Research and Development (HERD).
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see link, table 36 *minus* table 52), but now data must be queried via WebCASPAR.
Percent of R&D Expenditures funded from External Sources	This metric reports the amount of research expenditures that was funded from federal, private industry and other (non-state and non-institutional) sources. Source: National Science Foundation annual survey of Higher Education Research and Development (HERD).
Patents Issued	The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A).
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A).
Licensing Income Received ($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. Data as reported in the 2012-13 Accountability Report (table 6A).
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 2012-13 Accountability Report (table 6A).
National rank is higher than predicted by Financial Resources Ranking *based on US News & World Report*	This metric compares the overall national university ranking to the financial resources rank as reported by the US News and World report.
Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually as reported in the 2012-13 Accountability Report (table 5B).

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	10/01/2008 to 9/30/2011 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	10/01/2009 to 9/30/2012 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	10/01/2010 to 9/30/2013 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	10/01/2011 to 9/30/2014 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	10/01/2012 to 9/30/2015 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	10/01/2013 to 9/30/2016 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	10/01/2014 to 9/30/2017 10/01/2014 to 9/30/2015