

USF

System

2012-13
Work Plan



University of South Florida - System

Work Plan Presentation for 2012-13 Board of Governors Review

Approved by the USF System BOT – June 14, 2012



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.



TABLE OF CONTENTS

1. STRATEGY

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

2. KEY PERFORMANCE INDICATORS

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

3. OPERATIONS

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

4. DEFINITIONS



MISSION STATEMENT *(What is your purpose?)*

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

VISION STATEMENT *(What do you aspire to?)*

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

STATEMENT OF STRATEGY *(How will you get there?)*

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

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

STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

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



KEY INITIATIVES & INVESTMENTS *(within 3 years)*

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

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

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

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



KEY PERFORMANCE INDICATORS

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

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

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



KEY PERFORMANCE INDICATORS

Goals Common to All Universities

| | 5 YEAR TREND (05-06 to 10- 11) | 2010-11 ACTUAL | 2011-12 ESTIMATES | 2012-13 GOALS | 3 YEAR GOALS (2014-15) |
|---|---|--|------------------------------|--------------------------|---------------------------------------|
| Academic Quality | | | | | |
| National Ranking for University and Programs | | | | | |
| The USF System will (a) Engage in high impact student success research; (b) Establish partnerships to enhance student access to academic programs and research; (c) Educate competitive, highly-skilled (STEM) students ready to enter the workforce; (d) Continue to develop nationally ranked programs at all institutions. | | | | | |
| Avg. SAT Score | -1% ¹ | 1672 | 1700 | 1718 | 1720 |
| Avg. High School GPA (on 4.0 scale) | 5% | 3.67 | 3.76 | 3.78 | 3.82 |
| Professional/Licensure Exam | | | | | |
| First-time Pass Rates² | | | | | |
| Exams Above National/State Benchmark | n/a | 3 | 3 | 4 | 4 |
| Exams Below National/State Benchmark | n/a | 2 | 2 | 1 | 1 |
| Percent of Undergraduate Seniors Participating in a Research Course | n/a | A system-wide definition will be determined during the Summer of 2012. | | | |
| SUBTOTAL OF IMPROVING METRICS | 1 | 2 | 3 | 2 | |
| Operational Efficiency | | | | | |
| Freshman Retention Rate | 5% | 87.6% | 88% | 89% | 90% |
| FTIC Graduation Rates | | | | | |
| In 4 years (or less) | 14% | 34.7% | 35% | 36% | 38% |
| In 6 years (or less) | 6% | 51.6% | 52% | 54% | 56% |
| AA Transfer Graduation Rates | | | | | |
| In 2 years (or less) | 0% | 29.6% | 30% | 30.5% | 31.5% |
| In 4 years (or less) | 4% | 65.7% | 66% | 68% | 70% |
| Percent of Bachelor's Degrees Without Excess Hours | n/a | Board staff is currently updating the methodology for this metric. | | | |
| SUBTOTAL OF IMPROVING METRICS | 4 | 6 | 6 | 6 | 6 |
| Return on Investment | | | | | |
| Bachelor's Degrees Awarded | 32% | 8287 | 8699 | 8750 | 8850 |
| Percent of Bachelor's Degrees in STEM | % | 20% | 20.5% | 20.5% | 21% |
| Graduate Degrees Awarded | 26% | 2992 | 3090 | 3125 | 3250 |
| Percent of Graduate Degrees in STEM | 2% | 21% | 21% | 21% | 21.5% |
| Percent of Baccalaureate Graduates Employed in Florida | -7% | n/a | 65% | 65% | 65% |
| Percent of Baccalaureate Graduates Continuing their Education (in FL) | -1% | n/a | 18% | 18% | 20% |
| Annual Gifts Received (\$M) | 76% | \$81.5 | \$47.2 | \$51.9 | \$62.8 |
| Endowment (\$M) | 4% | \$344.6 | \$347.0 | \$375.0 | \$437.0 |
| SUBTOTAL OF IMPROVING METRICS | 5 | 4 | 4 | 7 | |
| TOTAL OF IMPROVING METRICS | 10 | 12 | 13 | 15 | |

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



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

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

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



KEY PERFORMANCE INDICATORS

Institution Specific Goals

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

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

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

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

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

| | | | | | |
|-----------------------------|-----|---------|-------|-------|-------|
| Total Research Expenditures | 31% | \$400.7 | \$422 | \$443 | \$465 |
|-----------------------------|-----|---------|-------|-------|-------|

Goal 2. With a strategic goal of engaging in impactful research, the USF System will continue to build a sustainable research infrastructure, including federal research expenditures as defined by the National Science Foundation.

| | | | | | |
|-------------------------------|-----|----------|----------|----------|----------|
| Federal Research Expenditures | 59% | \$ 245.4 | \$ 257.7 | \$ 270.6 | \$ 284.1 |
|-------------------------------|-----|----------|----------|----------|----------|



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 | \$ 307.5 | \$ 288.7 | \$ 269.5 | \$ 291.9 | \$ 249.2 | \$ 178.5* |
| Tuition | \$ 109.7 | \$ 115.0 | \$ 126.3 | \$ 143.7 | \$ 163.2 | n/a |
| TOTAL MAIN OPERATIONS | \$ 417.2 | \$ 403.7 | \$ 395.8 | \$ 435.6 | \$ 412.4 | \$ 178.5* |
| Education & General – Health-Science Center / Medical Schools | | | | | | |
| State Funds | \$66.7 | \$ 62.8 | \$ 66.6 | \$ 68.3 | \$ 64.8 | \$65.2* |
| Tuition | \$ 22.6 | \$ 26.3 | \$ 30.0 | \$ 32.9 | \$ 34.5 | n/a |
| TOTAL HSC | \$ 89.3 | \$ 89.1 | \$ 96.6 | \$ 101.2 | \$ 99.3 | \$65.2* |
| EDUCATION & GENERAL TOTAL REVENUES | \$ 506.5 | \$ 492.8 | \$ 492.4 | \$ 536.8 | \$ 511.7 | \$ 243.7* |

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

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

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

| | | | | | | |
|----------|----------|----------|----------|----------|----------|-----|
| Revenues | \$ 163.1 | \$ 171.4 | \$ 142.8 | \$ 159.3 | \$ 165.0 | n/a |
|----------|----------|----------|----------|----------|----------|-----|

Contracts & Grants

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

| | | | | | | |
|----------|----------|----------|----------|----------|----------|-----|
| Revenues | \$ 260.4 | \$ 346.3 | \$ 296.9 | \$ 280.7 | \$ 243.8 | n/a |
|----------|----------|----------|----------|----------|----------|-----|

Local Funds

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

| | | | | | | |
|----------|----------|----------|----------|----------|----------|-----|
| Revenues | \$ 145.7 | \$ 135.1 | \$ 408.5 | \$ 442.4 | \$ 382.6 | n/a |
|----------|----------|----------|----------|----------|----------|-----|

Faculty Practice Plans

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

| | | | | | | |
|----------|----------|----------|----------|----------|--------------|-----|
| Revenues | \$ 174.9 | \$ 150.2 | \$ 174.7 | \$ 183.6 | \$ 185.4 est | n/a |
|----------|----------|----------|----------|----------|--------------|-----|

| | | | | | | |
|---|-----------------|-----------------|------------------|------------------|-----------------|------------|
| OTHER BUDGET ENTITY TOTAL REVENUES | \$ 744.1 | \$ 802.9 | \$ 1022.9 | \$ 1065.9 | \$ 976.8 | n/a |
|---|-----------------|-----------------|------------------|------------------|-----------------|------------|

| | | | | | | |
|--|------------------|------------------|------------------|------------------|------------------|------------|
| UNIVERSITY REVENUES GRAND TOTAL | \$ 1250.6 | \$ 1295.7 | \$ 1515.4 | \$ 1602.7 | \$ 1488.5 | n/a |
|--|------------------|------------------|------------------|------------------|------------------|------------|



FISCAL INFORMATION (continued)

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

| | FY 2010-11 ACTUAL | FY 2011-12 ACTUAL | FY 2012-13 REQUEST | FY 2013-14 PLANNED | FY 2014-15 PLANNED |
|----------------------------------|----------------------|----------------------|-----------------------|-----------------------|-----------------------|
| Base Tuition | | | | | |
| Tuition Differential Fee | | | | | |
| Percent Increase | | | | | |
| Required Fees¹ | | | | | |
| TOTAL TUITION AND FEES | | | | | |

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

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

Student Debt Summary

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

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

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

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

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

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

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



Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.

FISCAL INFORMATION (continued) TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

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

| Effective Date | |
|---|----|
| University Board of Trustees Approval Date: | |
| Implementation Date (month/year): | |
| Campus or Center Location | |
| Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such): | |
| Undergraduate Course(s) | |
| Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses): | |
| Current and Proposed Increase in the Tuition Differential Fee | |
| Current Undergraduate Tuition Differential per credit hour: | |
| Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential): | |
| \$ Increase in tuition differential per credit hour: | |
| \$ Increase in tuition differential for 30 credit hours: | |
| Projected Differential Revenue Generated | |
| Incremental differential fee revenue generated in 2012-13 (projected) : | \$ |
| Total differential fee revenue generated in 2012-13 (projected): | \$ |
| Intended Uses | |
| | |
| Describe the Impact to the Institution if Tuition Differential is Not Approved | |
| | |
| Request to Modify or Waive Tuition Differential Uses (this section is applicable only if HB 7135 is signed by the Governor and the university wishes to request a change to the 70% / 30% intended uses criteria identified in Regulation 7.001(14)) | |
| | |



FISCAL INFORMATION (continued) TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

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

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

| 2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request) | University Update on Each Initiative |
|---|--------------------------------------|
| Improve Baccalaureate retention and graduation | |
| Additional Detail, where applicable: | |
| Total Number of Faculty Hired or Retained (funded by tuition differential): | |
| Total Number of Advisors Hired or Retained (funded by tuition differential): | |
| Total Number of Course Sections Added or Saved (funded by tuition differential): | |
| 2011-2012 - 30% Initiatives (list the initiatives provided in the 2011-12 tuition differential request) | University Update on Each Initiative |
| Increase the number of students who are awarded grants funded by the tuition differential. | |
| Increase the average amount of awards in order to partially off-set tuition increases for needy students. | |
| Additional Information (estimates as of April 30, 2012): | |
| Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award: | |
| \$ Mean (per student receiving an award) of Tuition Differential-Funded Awards: | |
| \$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards: | |
| \$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards: | |



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

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



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

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



ENROLLMENT PLANNING

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

| | 5 YEAR TREND <i>(2005-06 to 2010-11)</i> | 2010-11 ACTUAL HEADCOUNT | | 2012-13 PLANNED HEADCOUNT | | 2013-14 PLANNED HEADCOUNT | | 3 YEAR <i>(2014-15)</i> PLANNED HEADCOUNT | |
|---------------------------|--|--------------------------------|-------------|---------------------------------|-------------|---------------------------------|-------------|--|-------------|
| UNDERGRADUATE | | | | | | | | | |
| FTIC (Regular Admit) | 4% | 17510 | 48% | 17488 | 48% | 17213 | 48% | 16793 | 48% |
| FTIC (Profile Admit) | -60% | 227 | 1% | 215 | 1% | 221 | 1% | 224 | 1% |
| AA Transfers* | 27% | 11,961 | 33% | 11834 | 33% | 11519 | 32% | 11425 | 32% |
| Other Transfers | 1% | 6,594 | 18% | 6866 | 19% | 6702 | 19% | 6860 | 19% |
| Subtotal | 9% | 36,292 | 100% | 36,403 | 100% | 35,655 | 100% | 35,302 | 100% |
| GRADUATE STUDENTS | | | | | | | | | |
| Master's | 16% | 6,522 | 69% | 6589 | 69% | 6753 | 69% | 6915 | 69% |
| Research Doctoral | 23% | 2,289 | 24% | 2312 | 24% | 2335 | 24% | 2358 | 24% |
| Professional Doctoral | 24% | 604 | 6% | 624 | 7% | 644 | 7% | 664 | 7% |
| Subtotal | 18% | 9,415 | 100% | 9,525 | 100% | 9,732 | 100% | 9,937 | 100% |
| NOT-DEGREE SEEKING | -5% | 2,093 | | 1,910 | | 2,048 | | 2,209 | |
| MEDICAL | 18% | 473 | | 480 | | 480 | | 480 | |
| TOTAL | 10% | 48,273 | | 48,318 | | 47,915 | | 47,928 | |

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

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

| | 5 YEAR TREND <i>(2005-06 to 2010-11)</i> | 2010-11 | | 2012-13 | | 2013-14 | | 3 YEAR <i>(2014-15)</i> | |
|----------------------|--|---------------|---------------|----------------|---------------|----------------|---------------|----------------------------|---------------|
| | | ACTUAL FTE | % of TOTAL | PLANNED FTE | % of TOTAL | PLANNED FTE | % of TOTAL | PLANNED FTE | % of TOTAL |
| UNDERGRADUATE | | | | | | | | | |
| DISTANCE (>80%) | % | 4743 | 20% | 5127 | 20% | 5365 | 20% | 5620 | 20% |
| HYBRID (50%-79%) | %Δ | 349 | 1% | 517 | 2% | 627 | 2% | 709 | 3% |
| TRADITIONAL (<50%) | %Δ | 18723 | 79% | 19552 | 78% | 20395 | 77% | 21281 | 77% |
| TOTAL | %Δ | 23,815 | 100% | 25,196 | 100% | 26,386 | 100% | 27,610 | 100% |
| GRADUATE | | | | | | | | | |
| DISTANCE (80%) | %Δ | 1066 | 19% | 1117 | 19% | 1173 | 19% | 1235 | 20% |
| HYBRID (50%-79%) | %Δ | 110 | 2% | 120 | 2% | 135 | 2% | 153 | 2% |
| TRADITIONAL (<50%) | %Δ | 4314 | 79% | 4502 | 78% | 4710 | 78% | 4921 | 78% |
| TOTAL | %Δ | 5,490 | 100% | 5,739 | 100% | 6,018 | 100% | 6,309 | 100% |

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



ENROLLMENT PLANNING (continued)

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

| | Funded 2011-12 | Estimated 2011-12 | Funded 2012-13 | Planned 2012-13 | Planned 2013-14 | 3 Year Planned 2014-15 | 5 Year Planned 2016-17 | 5-Year Projected Average Annual Growth Rate |
|-------------------------------|-------------------|----------------------|-------------------|--------------------|--------------------|------------------------------|------------------------------|--|
| <i>Florida Resident</i> | | | | | | | | |
| LOWER DIVISION | 9377 | 9431 | 9377 | 9248 | 9242 | 9274 | 9488 | 0.6% |
| UPPER DIVISION | 13361 | 14580 | 13361 | 14564 | 14423 | 14314 | 14582 | 0.03% |
| GRAD I | 3679 | 3635 | 3679 | 3455 | 3424 | 3440 | 3509 | 0.5% |
| GRAD II | 855 | 1132 | 855 | 969 | 984 | 1012 | 1136 | 4% |
| TOTAL | 27,272 | 28,778 | 27,272 | 28,226 | 28,073 | 28,040 | 28,715 | 1% |
| <i>Not a Florida Resident</i> | | | | | | | | |
| LOWER DIVISION | 0.00 | 397 | 0.00 | 574 | 660 | 764 | 1054 | 16% |
| UPPER DIVISION | 0.00 | 436 | 0.00 | 550 | 592 | 638 | 753 | 8% |
| GRAD I | 0.00 | 371 | 0.00 | 555 | 586 | 624 | 699 | 6% |
| GRAD II | 0.00 | 498 | 0.00 | 600 | 634 | 659 | 722 | 5% |
| TOTAL | 1400 | 1702 | 1400 | 2,278 | 2,472 | 2,685 | 3,229 | 9% |
| <i>Total</i> | | | | | | | | |
| LOWER DIVISION | 9377 | 9828 | 9377 | 9822 | 9902 | 10038 | 10542 | 2% |
| UPPER DIVISION | 13361 | 15016 | 13361 | 15114 | 15015 | 14952 | 15335 | 0.4% |
| GRAD I | 3679 | 4006 | 3679 | 3999 | 4011 | 4064 | 4208 | 1% |
| GRAD II | 855 | 1630 | 855 | 1569 | 1617 | 1671 | 1859 | 4% |
| TOTAL | 28,672 | 30,480 | 28,672 | 30,505 | 30,544 | 30,725 | 31,945 | 1% |
| TOTAL (US FTE) | 38,228 | 40,639 | 38,228 | 40,571 | 40,624 | 40,864 | 42,487 | |

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

Medical Student Headcounts (FTE does not apply)

| <i>Medicine Headcounts</i> | | | | | | | | |
|----------------------------|------------|------------|------------|------------|------------|------------|------------|--------------|
| FLORIDA RESIDENT | 480 | 445 | 480 | 436 | 432 | 432 | 432 | -0.18% |
| NON-RESIDENT | 0 | 32 | 0 | 44 | 48 | 48 | 48 | 1.76% |
| TOTAL | 480 | 477 | 480 | 480 | 480 | 480 | 480 | 0.00% |



ACADEMIC PROGRAM COORDINATION

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

| PROGRAM TITLES | CIP CODE 6-digit | AREA OF STRATEGIC EMPHASIS | OTHER UNIVERSITIES WITH SAME PROGRAM | OFFERED VIA DISTANCE LEARNING IN SYSTEM | PROJECTED ENROLLMENT <i>in 5th year</i> | PROPOSED DATE OF SUBMISSION TO UBOT |
|--|---------------------|-------------------------------------|---|---|---|---|
| BACHELOR'S PROGRAMS | | | | | | |
| B.A. Film and New Media Studies (Tampa) | 50.0602 | No | FSU,UF,UNF,UWF,UCF,FIU,FAU | | 117 | May 2013 |
| B.A. World Languages and Cultures (St. Pete) | 16.0101 | No | UCF | N/Y | 65 | Aug 2013 |
| B.A. Business & Technical Comm. (SM) | 23.1101 | No | None | N | 100 | May 2013 |

**Program has not completed internal approval process*

***Substitution for B.S. Digital Design & Tech.*

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

| | | | | | | |
|--|---------|------|-------------------------|-----|------|----------|
| Sports & Entertainment Mgt (Tampa) | 31.0504 | No | FAMU,FAU,FIU,FSU,UCF,UF | N | 25 | May 2013 |
| Athletic Training (Tampa) | 51.0913 | No | FIU | N | 30 | May 2013 |
| Metabolic & Nutritional Medicine (Tampa) | 26.9999 | STEM | None | N/Y | 37.5 | May 2013 |
| M.A. Education* (SM) | 13.0101 | No | UCF, FAU | Y/N | 50 | Dec 2012 |

**Program has not completed internal review process*

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 | | | | | | |
| B.A. Marine Science (St. Pete) | 40.0607 or 26.1302 | STEM | All | Partial | 50 | August 2015 |
| Biology (SM) | 26.0101 | STEM | FAMU, FAU, FGCU, FIU, UCF, UF,UWF | N | 100 | October 2014 |
| Operations Research & Management (SM) | 52.0205 | N/A | None | N | 50 | October 2014 |
| MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS | | | | | | |
| Diplomacy and Strategic Studies (Tampa) | 30.2011 | No | FIU | Partial | 35 | August 2015 |
| Physician Assistant (Tampa) | 51.0912 | STEM | UF | N | 50 | August 2014 |
| Accountancy (Forensic) (St. Pete) | 52.0301 | No | FAU | N | 75 | August 2015 |
| Non-Profit Leadership and Management (St. Pete) | 52.0206 | No | FAU, UCF, UWF | Partial | 30 | August 2015 |
| Education Specialist (Special Ed) | 13.1001 | Education | FSU, UF | Partial | 30 | August 2015 |



and ESOL) (St. Pete)

| | | | | | | |
|---|---------|------|----------|---------|----|--------------|
| Communication Sciences and Disorders (SM) | 51.0201 | N/A | None | Y | 50 | October 2014 |
| Social Science Education(SM) | 13.1317 | N/A | FSU, UWF | N | 40 | October 2014 |
| DOCTORAL PROGRAMS | | | | | | |
| Cell and Molecular Biology (Tampa) | 26.0400 | STEM | UF | N | 40 | August 2014 |
| Integrative Biology (Tampa) | 26.1399 | STEM | UF, UCF | N | 40 | August 2014 |
| Rehabilitation Sciences (Tampa) | 51.2314 | STEM | UF | Partial | 20 | August 2015 |
| Translational Neurosciences (Tampa) | 26.0608 | STEM | None | Partial | 20 | August 2015 |



KEY PERFORMANCE INDICATOR DEFINITIONS

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



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



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