



Item: SP: A-1

STRATEGIC PLANNING COMMITTEE
Thursday, April 19, 2012

SUBJECT: DRAFT 2012 FAU WORK PLAN

PROPOSED COMMITTEE ACTION

Request For Approval of the Draft 2012 FAU Work Plan

BACKGROUND INFORMATION

The Board of Governors revised the SUS template for the annual Work Plan in 2012. The new guidelines align dashboard metrics with the Preeminence Bill HB 7129, Accountability Bill HSB 7135, System Strategic Plan and the 2012 Work Plan. Attached is a copy of the revised University Work Plan - June 2012, Summary Dashboard Metrics by Source, and the 2012 Work Plan Timeline.

The new 2012 Work Plan contains three major sections. The first section includes metrics common to all SUS institutions under the categories of Academic Quality, Operational Efficiency, and Return on Investment. The second section includes metrics common to the seven SUS Research Universities as classified by the Carnegie Foundation. The third category includes institution specific indicators including at least three that are unique to the institution's mission.

The Board of Governors has specified that University Board of Trustees approved 2012-13 University Work Plans are due to the Board Office by **May 22, 2012**. However, in recognition that some UBOTs are not scheduled to meet prior to May 22, 2012, the Board of Governors will accept 2012-13 University Work Plans submitted by that date by presidents or UBOT chairs "pending full UBOT approval," with the expectation that said approval will be received prior to the June 2012 meeting of the Board of Governors.

IMPLEMENTATION PLAN/DATE

N/A

FISCAL IMPLICATIONS

N/A

Supporting Documentation:

1) University Work Plan-June 2012; (2) Summary Dashboard Metrics by Source; and (3) 2012 Work Plan Timeline

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ABC

2012-13 Work Plan



ABC State University

Work Plan Presentation for 2012-13 Board of Governors Review



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2012-13 components. Longer-term components will inform future agendas of the Board's Strategic Planning Committee. The Board's acceptance of a work plan does not constitute approval of any particular component, nor does it supersede any necessary approval processes that may be required for each component.



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MISSION STATEMENT (What is your purpose?)

Blank area for the Mission Statement.

VISION STATEMENT (What do you aspire too?)

Blank area for the Vision Statement.

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.

Blank area for the Statement of Strategy.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

What are your core capabilities and opportunities (aka “weaknesses”) for improvement?

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

2

3



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 (06-07 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					
Describe plans for increasing national preeminence of University and select programs.					
Avg. SAT Score	%Δ	x,xxx	x,xxx	x,xxx	x,xxx
Avg. High School GPA (on 4.0 scale)	%Δ	x.x	x.x	x.x	x.x
Professional/Licensure Exam First-time Pass Rates					
Exams Above National/State Benchmark	n/a	x	x	x	x
Exams Below National/State Benchmark	n/a	x	x	x	x
Percent of Undergraduate Seniors Participating in a Research Course	n/a	A system-wide definition will be determined during the Summer of 2012.			
SUBTOTAL OF IMPROVING METRICS		x	x	x	x
Operational Efficiency					
Freshman Retention Rate	%Δ	xx%	xx%	xx%	xx%
FTIC Graduation Rates					
In 4 years (or less)	%Δ	xx%	xx%	xx%	xx%
In 6 years (or less)	%Δ	xx%	xx%	xx%	xx%
AA Transfer Graduation Rates					
In 2 years (or less)	%Δ	xx%	xx%	xx%	xx%
In 4 years (or less)	%Δ	xx%	xx%	xx%	xx%
Percent of Bachelor's Degrees Without Excess Hours	%Δ	%	%	%	%
SUBTOTAL OF IMPROVING METRICS		x	x	x	x
Return on Investment					
Bachelor's Degrees Awarded	%Δ	x,xxx	x,xxx	x,xxx	x,xxx
Percent of Bachelor's Degrees in STEM	%Δ	xx%	xx%	xx%	xx%
Master's Degrees Awarded	%Δ	x,xxx	x,xxx	x,xxx	x,xxx
Percent of Master's Degrees in STEM	%Δ	xx%	xx%	xx%	xx%
Percent of Baccalaureate Graduates Employed in Florida	%Δ	xx%	xx%	xx%	xx%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	%Δ	xx%	xx%	xx%	xx%
Annual Gifts Received (\$M)	%Δ	\$ x.x	\$ x.x	\$ x.x	\$ x.x
Endowment (\$M)	%Δ	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
SUBTOTAL OF IMPROVING METRICS		x	x	x	x
TOTAL OF IMPROVING METRICS		x	x	x	x

Note: Performance metrics are defined on pages 18-21.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Academic Quality					
Faculty Awards	%Δ	x	x	x	x
National Academy Members	%Δ	x	x	x	x
Number of Post-Doctoral Appointees	%Δ	xx	xx	xx	xx
Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures <i>(based on 8 broad discipline areas, and includes private universities)</i>	n/a	x	x	x	x
SUBTOTAL OF IMPROVING METRICS	x		x	x	x
Operational Efficiency					
To Be Determined		The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment					
Total Research Expenditures (\$M) <i>(includes non-Science & Engineering disciplines)</i>	%Δ	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Science & Engineering Research Expenditures (\$M)	%Δ	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Percent of Research Expenditures funded from External Sources	%Δ	X%	X%	X%	X%
Patents Issued	%Δ	x	x	x	x
Licenses/Options Executed	%Δ	x	x	x	x
Licensing Income Received (\$M)	%Δ	\$ x.x	\$ x.x	\$ x.x	\$ x.x
Number of Start-up Companies	%Δ	x	x	x	x
Science & Engineering R&D Expenditures in non-Medical/Health Sciences	%Δ	xx	xx	xx	xx
National Rank is Higher than Predicted by the Financial Resources Ranking <i>(based on U.S. News & World Report)</i>	n/a	xx	xx	xx	xx
Research Doctoral Degrees Awarded	%Δ	xx	xx	xx	xx
Percent of Research Doctoral Degrees Awarded in STEM	%Δ	xx%	xx%	xx%	xx%
Professional Doctoral Degrees Awarded	%Δ	xx	xx	xx	xx
SUBTOTAL OF IMPROVING METRICS	x		x	x	x
TOTAL OF IMPROVING METRICS	x		x	x	x



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 (06-07 to 10-11)	2010-11 ACTUAL	2011-12 ESTIMATES	2012-13 GOALS	3 YEAR GOALS (2014-15)
Metric #1	%Δ	x	x	x	x
Metric #2	%Δ	x	x	x	x
Metric #3	%Δ	x	x	x	x

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. *Text here.*

Metric	%Δ	x	x	x	x
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Goal 2. *Text here.*

Metric	%Δ	x	x	x	x
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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	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Tuition	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x*
TOTAL MAIN OPERATIONS	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Education & General – Health-Science Center / Medical Schools						
State Funds	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Tuition	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x*
TOTAL HSC	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Education & General – Institute of Food & Agricultural Sciences (IFAS)						
State Funds	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
Tuition	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
TOTAL IFAS	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x
EDUCATION & GENERAL TOTAL REVENUES	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x

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 students (as reported in the Annual Accountability Report). Note*: 2012-13 Appropriated tuition is based on the appropriated budget authority.

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	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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Contracts & Grants

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

Revenues	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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Local Funds

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

Revenues	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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Faculty Practice Plans

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

Revenues	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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OTHER BUDGET ENTITY TOTAL REVENUES	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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UNIVERSITY REVENUES GRAND TOTAL	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	\$ xx.x	n/a
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FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx
Tuition Differential Fee	\$xxx	\$xxx	\$xxx	\$x,xxx	\$x,xxx
Percent Increase	15%	15%	%	%	%
Required Fees¹	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx
TOTAL TUITION AND FEES	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx	\$x,xxx

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	xx%	xx%	xx%	xx%	xx%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx	\$xx,xxx
Student Loan Cohort Default Rate (2nd Year)	xx%	xx%	xx%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	xx%	xx%	xx%	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	\$x,xxx	\$xxx	\$x,xxx	\$xxx	\$xxx	\$xx,xxx
AT HOME	\$x,xxx	\$xxx	\$x,xxx	\$xxx	\$xxx	\$xx,xxx

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		AVG. NET COST OF ATTENDANCE	AVG. NET TUITION & FEES	AVERAGE GIFT AID AMOUNT	AVERAGE LOAN AMOUNT
	HEADCOUNT	PERCENT				
Below \$40,000	x,xxx	xx%	\$x,000	\$x,000	\$x,000	\$x,000
\$40,000-\$59,999	x,xxx	xx%	\$x,000	\$x,000	\$x,000	\$x,000
\$60,000-\$79,999	x,xxx	xx%	\$x,000	\$x,000	\$x,000	\$x,000
\$80,000-\$99,999	x,xxx	xx%	\$x,000	\$x,000	\$x,000	\$x,000
\$100,000 Above	x,xxx	xx%	\$x,000	\$x,000	\$x,000	\$x,000
Missing	x,xxx	xx%	\$x,000	\$x,000	\$x,000	\$x,000
TOTAL	x,xxx	100%	AVERAGE \$x,000	\$x,000	\$x,000	\$x,000

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



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

Effective Date	
University Board of Trustees Approval Date:	
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 how the revenue will be used.	
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.

2011-2012 - 70% Initiatives (list the initiatives provided in the 2011-12 tuition differential request)	University Update on Each Initiative
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
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

University Tuition Differential	Estimated Actual*	Estimated
Budget Entity: 48900100 (Educational & General)	2011-12	2012-13
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)	-----	-----
<u>FTE Positions:</u>		
Faculty	.	.
Advisors	.	.
Staff	.	.
Total FTE Positions:	0	0
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ -	\$ -
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ -	-
Interest Revenue - Current Year	-	-
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ -	\$ -
<u>Expenditures</u>		
Salaries & Benefits	\$ -	\$ -
Other Personal Services	-	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	-	-
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ -	\$ -
Ending Balance Available:	\$ -	\$ -

*Since the 2011-12 year has not been completed, provide an estimated actual.
 **Provide details for "Other Categories" used.



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

This page is an excel document, pasted here as a placeholder.

<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition - (0% inc. for 2013-14 to 2015-16)	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)							
Total Base Tuition & Differential per Credit Hour	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
% Change		8.0%	8.0%	0.0%	0.0%	0.0%	0.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16				
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76				
Activity & Service							
Health							
Athletic							
Transportation Access							
Technology ¹	\$4.42	\$4.78	\$5.16				
Green Fee (USF, NCF, UWF only)							
Student Life & Services Fee (UNF only)							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Fees	\$13.60	\$14.32	\$15.08	\$0.00	\$0.00	\$0.00	\$0.00
Total Tuition and Fees per Credit Hour	\$102.19	\$109.99	\$118.40	\$103.32	\$103.32	\$103.32	\$103.32
% Change		7.6%	7.6%	-12.7%	0.0%	0.0%	0.0%
Fees (block per term):							
Activity & Service							
Health							
Athletic							
Transportation Access							
Marshall Center Fee (USF only)							
Student Affairs Facility Use Fee (FSU only)							
Total Block Fees per term	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total Tuition for 30 Credit Hours	\$2,657.70	\$2,870.10	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
Total Fees for 30 Credit Hours	\$408.00	\$429.60	\$452.40	\$0.00	\$0.00	\$0.00	\$0.00
Total Tuition and Fees for 30 Credit Hours	\$3,065.70	\$3,299.70	\$3,552.00	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
\$ Change		\$234.00	\$252.30	-\$452.40	\$0.00	\$0.00	\$0.00
% Change		7.6%	7.6%	-12.7%	0.0%	0.0%	0.0%
Out-of-State Fees							
Out-of-State Undergraduate Fee							
Out-of-State Undergraduate Student Financial Aid ³							
Total per credit hour	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!
Total Tuition for 30 Credit Hours	\$2,657.70	\$2,870.10	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
Total Fees for 30 Credit Hours	\$408.00	\$429.60	\$452.40	\$0.00	\$0.00	\$0.00	\$0.00
Total Tuition and Fees for 30 Credit Hours	\$3,065.70	\$3,299.70	\$3,552.00	\$3,099.60	\$3,099.60	\$3,099.60	\$3,099.60
\$ Change		\$212.40	\$229.50	\$0.00	\$0.00	\$0.00	\$0.00
% Change		8.0%	8.0%	0.0%	0.0%	0.0%	0.0%
Housing/Dining⁴							
\$ Change	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change		#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!	#DIV/0!



ENROLLMENT PLANNING

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

	5 YEAR TREND (2006-07 to 2010-11)	2010-11 ACTUAL HEADCOUNT		2012-13 PLANNED HEADCOUNT		2013-14 PLANNED HEADCOUNT		3 YEAR (2014-15) PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
FTIC (Profile Admit)	%Δ	XXX	xx%	XXX	xx%	XXX	xx%	XXX	xx%
AA Transfers	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
Other Transfers	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
Subtotal	%Δ	x,XXX	100%	x,XXX	100%	x,XXX	100%	x,XXX	100%
GRADUATE STUDENTS									
Master's	%Δ	XXX	xx%	XXX	xx%	XXX	xx%	XXX	xx%
Research Doctoral	%Δ	XXX	xx%	XXX	xx%	XXX	xx%	XXX	xx%
Professional Doctoral	%Δ	XXX	xx%	XXX	xx%	XXX	xx%	XXX	xx%
Subtotal	%Δ	XXX	100%	XXX	100%	XXX	100%	XXX	100%
NOT-DEGREE SEEKING	%Δ	x,XXX		x,XXX		x,XXX		x,XXX	
MEDICAL	%Δ	x,XXX		x,XXX		x,XXX		x,XXX	
TOTAL	%Δ	x,XXX		x,XXX		x,XXX		x,XXX	

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

	5 YEAR TREND (2006-07 to 2010-11)	2010-11		2012-13		2013-14		3 YEAR (2014-15)	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
HYBRID (50%-79%)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
TRADITIONAL (<50%)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
TOTAL	%Δ	x,XXX	100%	x,XXX	100%	x,XXX	100%	x,XXX	100%
GRADUATE									
DISTANCE (80%)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
HYBRID (50%-79%)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
TRADITIONAL (<50%)	%Δ	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%	x,XXX	xx%
TOTAL	%Δ	x,XXX	100%	x,XXX	100%	x,XXX	100%	x,XXX	100%

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



ENROLLMENT PLANNING (continued)

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

	Funded 2011-12	Estimated 2011-12	Funded 2012-13	Planned 2012-13	Planned 2013-14	3 Year Planned 2014-15	5 Year Planned 2016-17	5-Year Projected Average Annual Growth Rate
Florida Resident								
LOWER DIVISION	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
UPPER DIVISION	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
GRAD I	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
GRAD II	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
TOTAL	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
Not a Florida Resident								
LOWER DIVISION	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
UPPER DIVISION	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
GRAD I	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
GRAD II	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
TOTAL	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
TOTAL								
LOWER DIVISION	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
UPPER DIVISION	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
GRAD I	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
GRAD II	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
TOTAL	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%
TOTAL (US FTE)	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	x,xxx	%

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

Medical Student Headcounts (FTE does not apply)

Medicine Headcounts								
FLORIDA RESIDENT	xxx	xxx	xxx	xxx	xxx	xxx	xxx	%
NON-RESIDENT	xx	xx	xx	xx	xx	xx	xx	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	%
Dentistry Headcounts								
FLORIDA RESIDENT	xxx	xxx	xxx	xxx	xxx	xxx	xxx	%
NON-RESIDENT	xx	xx	xx	xx	xx	xx	xx	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	%
Veterinary Headcounts								
FLORIDA RESIDENT	xxx	xxx	xxx	xxx	xxx	xxx	xxx	%
NON-RESIDENT	xx	xx	xx	xx	xx	xx	xx	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	%



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

New Programs To Be Considered by University in 2013-15 for Implementation

PROGRAM TITLES	CIP CODE 6-digit	AREA OF STRATEGIC EMPHASIS	OTHER UNIVERSITIES WITH SAME PROGRAM	OFFERED VIA DISTANCE LEARNING IN SYSTEM	PROJECTED ENROLLMENT <i>in 5th year</i>	PROPOSED DATE OF SUBMISSION TO UBOT
BACHELOR'S PROGRAMS						
MASTER'S, SPECIALIST AND OTHER ADVANCED MASTER'S PROGRAMS						
DOCTORAL PROGRAMS						



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities

Academic Quality

a. National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
b. Avg. SAT Score	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted and Registered FTIC (B,E) students.
c. Avg. HS GPA (on 4.0 scale)	The average HS GPA for Admitted and Registered FTIC (B,E) students.
d. 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.
e. 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

f. 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 second year.
g. 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.
h. 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.
i. 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

j. 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.
k. 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.
l. Master's Degrees Awarded	This is a count of graduate degrees granted.
m. Percent of Master's Degrees in STEM	The percentage of graduate degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
n. 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.
o. 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.
p. 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.
q. 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

a. 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 .
b. 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.
c. 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).



d. 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	
e. Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey.
f. 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).
g. Patents Issued	The number of patents issued in the fiscal year as reported to AUTM.
h. 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.
i. 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.
j. 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.
k. 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).
l. National rank is higher than predicted by available 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.
m. Research Doctoral Degrees Awarded	The number of research doctoral degrees awarded annually.
n. Percent of Research Doctoral Degrees Awarded in STEM	The percentage of research doctoral degrees that are classified as STEM by the Board of Governors in the SUS program inventory.
o. Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually.

2012-13 WORK PLAN: KEY PERFORMANCE INDICATORS BY SOURCE

METRICS	PREEMINENCE BILL HB 7129 (BOG1)	ACCOUNTABILITY BILL HB 7135 (BOG2)	SYSTEM STRATEGIC PLAN	2012 WORK PLAN
COMMON TO ALL UNIVERSITIES				
Academic Quality				
1 National ranking for institutional and program achievements	●	●	●	●
2 Avg SAT score for incoming Freshman	●	●		●
3 Avg. High School GPA for incoming Freshman	●	●		●
4 Professional/Licensure Exam Pass Rates		●	●	●
5 Percent of Undergraduate Seniors Participating in a Research Course			●	●
Operational Efficiency				
6 Freshman Retention	●	●		●
7 Graduation Rates (for FTIC)	●	●	●	●
8 Graduation Rates (for AA Transfer)	●	●		●
9 Percent of Bachelor's Degrees Without Excess Hours		●	●	●
Return on Investment				
10 Bachelor's Degrees Awarded Annually			●	●
11 Percent of Bachelor's Degrees in STEM			●	●
12 Master's Degrees Awarded Annually			●	●
13 Percent of Master's Degrees in STEM			●	●
14 Percent of Bachelor's Graduates Employed (in Florida)		●	●	●
15 Percent of Bachelor's Graduates Continuing their Education (in Florida)		●	●	●
16 Annual Giving	●	●		●
17 Endowments	●	●		●
SUBTOTAL	8	12	11	17
COMMON TO RESEARCH UNIVERSITIES (as Classified by Carnegie Foundation)				
Academic Quality				
18 Faculty Awards		●		●
19 National academy memberships	●		●	●
20 Number of post-doctoral appointees	●			●
21 Number of Science & Engineering Disciplines Nationally Ranked in Top 100 for Research Expenditures	●			●
Operation Efficiency				
To Be Determined	The Board of Governors will work with Universities to develop metrics associated with Operational Efficiencies.			
Return on Investment				
22 Total Research Expenditures	●	●	●	●
23 Science & Engineering Research Expenditures				●
24 Percent of R&D Expenditures funded from External Sources			●	●
25 Patents Issued	●	●		●
26 Licenses/Options Executed		●	●	●
27 Licensing Income/Royalties		●		●
28 Startup Companies		●	●	●
29 Science & Engineering research expenditures in non-medical/health sciences	●			●
30 National rank higher than predicted by the Financial Resources ranking based on U.S. News & World Report	●			●
31 Research Doctoral degrees awarded annually	●		●	●
32 Percent Research Doctoral degrees awarded in STEM			●	●
33 Professional Doctoral degrees awarded annually	●			●
SUBTOTAL	9	6	7	16

2012-13 WORK PLAN: KEY PERFORMANCE INDICATORS BY SOURCE

METRICS	PREEMINENCE	ACCOUNTABILITY	SYSTEM STRATEGIC PLAN	2012 WORK PLAN
	BILL HB 7129 (BOG1)	BILL HB 7135 (BOG2)		
INSTITUTION SPECIFIC <i>(universities choose at least three unique to their mission)</i>				
34 Freshman in Top 10% of Graduating High School Class			●	
35 Eligible Programs with Specialized Accreditation			●	
36 Average Time To Degree for First-time in College Students			●	
37 Bachelor's Degrees Awarded to Minorities			●	
38 Number of Adult (Aged 25+) Undergraduates Enrolled			●	
39 Percent of Course Sections Offered via Distance and Blended Learning			●	
40 Bachelor's Degrees in All Areas of Strategic Emphasis			●	
41 Graduate Degrees in All Areas of Strategic Emphasis			●	
42 Number of Faculty Designated a Highly Cited Scholar			●	
43 Seek and/or Maintain Carnegie's Community Engagement Classification			●	
44 Percentage of Students Participating in Identified Community & Business Engagement Activities			●	
45 Enrollment in Professional Training and Continuing Education Courses			●	
SUBTOTAL	0	0	12	3
TOTAL NUMBER OF METRICS	17	18	30*	36

Note*: The 2012-2025 System Strategic Plan identified 28 metrics, one of which was Graduate Degrees Awarded (and in STEM) that has been split into two Work Plan metrics (reporting Master's and Doctoral separately).

2012 Work Plan Timeline

DATES	ACTION
MAR. 15	Each University will submit its list of New Academic Program Proposals for the next three years, so Board staff can aggregate into one document for March 21 st meeting.
MAR. 21	CAVP Meeting to Review New Program Proposals & Program Coordination Issues per Regulation 8.004.
MAR. 21-22	BOARD OF GOVERNORS MEETING – 2012 WORK PLAN TEMPLATE FINALIZED
APR. 30	Universities Submit Draft Work Plans for Board of Governors staff review.
MAY 11	Board of Governors staff feedback to Universities
MAY 18	UNIVERSITIES SUBMIT FINAL WORK PLANS
PRIOR TO JUNE 20	UNIVERSITY BOARDS OF TRUSTEES APPROVE 2012 WORK PLANS
JUNE 20-21	BOARD OF GOVERNORS MEETING - CONSIDER 2012 WORK PLANS