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University Work Plan : 2012-2013

University of South Florida St. Petersburg.

University of South Florida. System.

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USFSP

2012-13 Work Plan



University of South Florida St. Petersburg

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.



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MISSION STATEMENT (What is your purpose?)

The University of South Florida St. Petersburg offers distinctive graduate and undergraduate programs in the arts and sciences, business, and education within a close-knit, student-centered learning community that welcomes individuals from the region, state, nation and world. We conduct wide-ranging, collaborative research to meet society's needs and engage in service projects and partnerships to enhance the university and community's social, economic and intellectual life. As an integral and complementary part of a multi-institutional system, USF St. Petersburg retains a separate identity and mission while contributing to and benefiting from the associations, cooperation, and shared resources of a premier national research university.

VISION STATEMENT (What do you aspire too?)

The University of South Florida St. Petersburg will be a premier masters degree level urban university recognized for its vibrant community of scholars who engage and improve its community and the world.

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.

USFSP's market is driven by its goal to be the masters comprehensive university of choice in the Tampa Bay region and beyond. Recognized by the Carnegie Foundation for the Advancement of Teaching as a community-engaged university, USFSP will continue its strategies of developing distinctive academic programs for both undergraduate and graduate students that reflect community and regional needs, of nurturing vibrant student-faculty interaction, and of providing student-centered support for curricular and co-curricular activities. In addition, it will pursue these strategies through careful financial and environmental stewardship. It will measure its success through a combination of internal and external measures, including student measures of academic performance, increased student degree completion, and measures of civic engagement.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

USFSP’s core capabilities include excellence in teaching, high levels of faculty-student interaction in research, student success, faculty achievement, entrepreneurial spirit, strong and collaborative community engagement, key partnerships, and high accountability for results. USFSP also provides students with an intimate intellectual environment to facilitate their growth as active learners and instill life-long habits of the mind. USFSP has high potential for growth in enrollment, even as it retains its institutional character of close faculty-student interactions in the classroom, laboratory, and studio. The single largest challenge will be to continue to provide excellence with continuously declining state support (58% reduction since 2007). Academic facilities are also key unmet need.

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. Increase the percentage of residential students as a percent of the total student body.

- Currently USFSP houses about 11% of its undergraduate student body in university housing.
- National research shows that increased residential living promotes higher retention, greater student participation in co-curricular activities; and higher graduation rates

To reach this goal, USFSP will open additional residential spaces in 2012 to raise the overall residential student numbers to 15% of the undergraduate student body. USFSP will also increase its focus on the residential experience as a co-curricular activity.

2. Expand graduate and undergraduate academic programs to meet regional need and demand. These programs will be carefully selected to:

- Add value to economic growth and vitality in St. Petersburg and in Pinellas County particularly in the area of new business and small business development
- Meet important future workforce needs
- Assist Pinellas County schools (K-12) in meeting key educational goals

To reach this goal, USFSP will work proactively with its regional stakeholders and with prospective employers to anticipate demand and then develop academic programs to meet that demand.

3. Enhance the number and quality of the established faculty ranks at USFSP. Currently, USFSP has many outstanding developing (pre-tenure) faculty in its ranks. While this sets the stage for a long future of high quality academic programs and scholarly productivity, USFSP has a dearth of established faculty, especially in the full Professor ranks. Recruitment of such individuals in key disciplines will strengthen USFSP’s academic leadership and facilitate the achievement of USFSP’s strategic goals.

To reach this goal, USFSP will focus on highly selective opportunities to recruit outstanding senior faculty in key curricular areas.



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					
USFSP achieved national ranking in US News and World Reports (#36 among regional institutions). USFSP is the only Florida institution ranked nationally in business for a focus on corporate and social responsibility. USFSP will seek membership in national honor societies both at the disciplinary and institutional levels.					
Avg. SAT Score	0.4%	1626	1602	1626	1626
Avg. High School GPA (on 4.0 scale)	.0%	3.5	3.5	3.5	3.5
Professional/Licensure Exam First-time Pass Rates					
Exams Above National/State Benchmark	n/a	n/a	n/a	n/a	n/a
Exams Below National/State Benchmark	n/a	n/a	n/a	n/a	n/a
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	x
Operational Efficiency					
Freshman Retention Rate	5%*	71%	72%	73%	75%
FTIC Graduation Rates					
In 4 years (or less)	6%*	21%	27%	32%	42%
In 6 years (or less)	-.03%	29%	30%	32%	35%
AA Transfer Graduation Rates					
In 2 years (or less)	-4%	23%	27%	32%	42%
In 4 years (or less)	7%	59%	59%	60%	62%
Percent of Bachelor's Degrees Without Excess Hours	n/a	Board staff is currently updating the methodology for this metric.			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
Return on Investment					
Bachelor's Degrees Awarded	9%	705	730	750	750
Percent of Bachelor's Degrees in STEM	14%	7%	7%	10%	15%
Master's Degrees Awarded	20%	144	144	144	144
Percent of Master's Degrees in STEM	7%*	7%	7%	9%	10%
Percent of Baccalaureate Graduates Employed in Florida	n/a	Data reported at the USF System level			
Percent of Baccalaureate Graduates Continuing their Education (in FL)	n/a	Data reported at the USF System level			
Annual Gifts Received (\$M)	n/a	Data reported at the USF System level			
Endowment (\$M)	n/a	Data reported at the USF System level			
SUBTOTAL OF IMPROVING METRICS	x	x	x	x	x
TOTAL OF IMPROVING METRICS	x	x	x	x	x

* Five-yr trends are widely variable on data such as FTICs (new at USFSP) or STEM degrees which are new at USFSP.



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 Average time to degree for FTICs	5%	4.3	4.2	4.1	4.0
Metric #2 Pct. of Online/Blended Courses	8%	12%	13%	14%	15%
Metric #3 Maintain Carnegie's Community Engagement	100%*	✓	✓	✓	✓

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. Enhance undergraduate and graduate degree programs (USF System Goals 1 and 3); USFSP will continue to add undergraduate and graduate degree programs in response to regional need and demand; USFSP will improve efficiency of its curriculum in both structure and delivery, especially by exploring opportunities for USF System collaboration and for non-traditional forms of delivery.

Metric: Total annual SCH production	27%	112,672	121,276	122,815	124,657
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Goal 2. *Improve baccalaureate retention and graduation (USF System Goal 1); USFSP will focus on improving student outcomes in key mathematics courses through continued implementation of its Quality Enhancement Plan; focus on improving access to academic support (i.e., tutoring); continued emphasis on strengthening academic advising.*

Metric: Increase 6-year baccalaureate graduation rate	-.03%	29%	30%	32%	35%
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*USFSP earned this designation in 2011-12 and will retain this designation through 2015, the next application cycle.



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	\$ 28.4	\$ 26.1	\$ 24.6	\$ 24.4	\$ 21.0	\$ 16.9
Tuition	\$ 9.4	\$ 10.7	\$ 12.9	\$ 14.7	\$ 17.5	n/a
TOTAL MAIN OPERATIONS	\$ 37.7	\$ 36.7	\$ 37.5	\$ 39.1	\$ 38.5	\$ 16.9
EDUCATION & GENERAL TOTAL REVENUES	\$ 37.7	\$ 36.7	\$ 37.5	\$ 39.1	\$ 38.5	\$ 16.9

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

OTHER BUDGET ENTITIES

Auxiliary Enterprises

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

Revenues **Data reported at the USF System Level**

Contracts & Grants

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

Revenues **Data reported at the USF System Level**

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 **Data reported at the USF System Level**

Faculty Practice Plans

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

Revenues **Data reported at the USF System Level**

**OTHER BUDGET ENTITY
TOTAL REVENUES** **Data reported at the USF System Level**

**UNIVERSITY REVENUES
GRAND TOTAL** **Data reported at the USF System Level**



FISCAL INFORMATION (continued)

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

	FY 2010-11 ACTUAL	FY 2011-12 ACTUAL	FY 2012-13 REQUEST	FY 2013-14 PLANNED	FY 2014-15 PLANNED
Base Tuition	\$2,870	\$3,100	\$3,100	\$3,100	\$3,100
Tuition Differential Fee	\$384	\$643	\$1,054	\$1,677	\$2,394
Percent Increase	15%	15%	11%	15%	15%
Required Fees ¹	\$1,350	\$1,440	\$1,492	\$1,492	\$1,492
TOTAL TUITION AND FEES	\$4,604	\$5,183	\$5,646	\$6,269	\$6,986

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

Student Debt Summary

	2007-08 ACTUAL	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ESTIMATE
Percent of Bachelor's Recipients with Debt	41%	42%	40%	48%	48%
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	\$19,640	\$20,181	\$20,827	\$22,836	\$23,000
Student Loan Cohort Default Rate (2nd Year)	4.9%	6.3%	7.0%	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)	xx%	xx%	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	\$5,200	\$1,500	\$9,190	\$1,600	\$2,500	\$19,990
AT HOME	\$5,200	\$1,500	\$4,590	\$1,600	\$2,500	\$15,390

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	646	35%	\$12,032	-\$2,281	\$7,043	\$4,709
\$40,000-\$59,999	239	13%	\$13,869	\$39	\$4,794	\$3,673
\$60,000-\$79,999	189	10%	\$15,411	\$2,124	\$2,783	\$3,881
\$80,000-\$99,999	183	10%	\$15,787	\$2,391	\$2,503	\$3,493
\$100,000 Above	441	24%	\$16,229	\$2,688	\$2,195	\$2,300
Missing	161	8%	\$15,572	\$4,606	\$143	\$96
TOTAL	1,859	100%	AVERAGE \$14,284	\$700	\$4,126	\$3,401

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



FISCAL INFORMATION (continued)

TUITION DIFFERENTIAL FEE REQUEST FOR 2012-13

Effective Date	
University Board of Trustees Approval Date:	June 2012
Implementation Date (month/year):	August 2012
Campus or Center Location	
Campus or Center Location to which the Tuition Differential fee will apply (If the entire university, indicate as such):	Entire University
Undergraduate Course(s)	
Course(s). (If the tuition differential fee applies to all university undergraduate courses, indicate as such. If not, also provide a rationale for the differentiation among courses):	All undergraduate students
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$21.42
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	11%
\$ Increase in tuition differential per credit hour:	\$13.72
\$ Increase in tuition differential for 30 credit hours:	\$411.60
Projected Differential Revenue Generated	
Incremental differential fee revenue generated in 2012-13 (projected):	\$1,453,850
Total differential fee revenue generated in 2012-13 (projected):	\$3,475,754
Intended Uses	
<p>Cost-efficient utilization of instructional technology and innovation , along with investments in faculty and professional staff to enhance timely college completion rates, attainment and career placement through activities such as:</p> <ul style="list-style-type: none"> • Need-Based Financial Aid (at 40%): Expand access for students; and accelerated path to graduation. Provide much needed financial support for talented students with limited income as Pell grant funding continues to shrink. More students supported with financial aid scholarships and reduced loan indebtedness. • Expanding the High Skilled Workforce and Assuring Job Placement, especially in STEM: Expanded STEM and IT programs and degrees awarded; Strengthened relationships with business and industry; Increased number of co-op partnerships; Expanded professional support for job placement through USF's Career Center/Job Hub. • Academic Advising and Veterans' Support: Enhanced academic advising through technology, focus on goal setting, time-to-degree, improved graduation rates, reducing excess hours, and expanding USF's Veterans' Success program. Improved tracking of students and graduates. • Financial Counseling and Debt Reduction: Financial impact of the increasing costs of higher education mitigated through focused and proactive financial counseling and debt reduction strategies. Reduced amount of student debt. Reduced number and percentage of students with debt. 	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
<p>Significant risk and negative impact on progress toward BOG/SUS and BOT/USF strategic goals. USF System efforts to move away from the traditional delivery model will be significantly impaired or delayed, potentially resulting in stagnant or declining graduation rates and a reduced ability to meet the workforce demands of the state. The loss of potential need-based financial aid (40%) will further reduce student access, retention and graduation rates while likely increasing student indebtedness. USF's commitment to investing in (60%) enhanced instruction and learning (particularly in STEM), serving returning veterans, reducing excess hours and student debt, and job placement for graduates will be diminished or, at best, delayed.</p>	

**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))

The University of South Florida System is requesting permission to change the intended use criteria for tuition differential uses, identified in Regulation 7.001(14), for academic year 2012-2013 from 70%/30% to 60%/40%. The proportion of Pell eligible students at USF now exceeds 40%, and with declining federal aid, the institution believes that this is a worthwhile investment to ensure timely completion of degrees and reduced student indebtedness.



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
Improve graduation rates through QEP	QEP implementation ongoing, successful first year. Enhanced Career Center.
Increase faculty/student research and creative activity	Research funding at all-time high. Increased student presentations, research posters and papers and student research awards.
Enhanced undergraduate programs	New faculty in Psychology, History. Increased SCH production and course availability.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	16
Total Number of Advisors Hired or Retained (funded by tuition differential):	3
Total Number of Course Sections Added or Saved (funded by tuition differential):	97
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.	We were able to increase the number of students paid by 278, or 120.3%.
Increase the average amount of awards in order to partially off-set tuition increases for needy students.	The average award increased by \$238, which represents an increase of 22.5%.
Additional Information (estimates as of April 30, 2012):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	509
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1293
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	122
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2500



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	13.16	20.57
Advisors	2.18	8.00
Staff	3.08	4.08
Total FTE Positions:	18.42	32.65
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ 472,432	\$ 649,783
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ 472,432	\$ 649,783
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 2,021,904	3,475,754
Interest Revenue - Current Year	500	2,000
Interest Revenue - From Carryforward Balance	750	1,000
Total Receipts / Revenues:	\$ 2,023,154	\$ 3,478,754
<u>Expenditures</u>		
Salaries & Benefits	\$ 1,217,232	\$ 2,026,000
Other Personal Services	-	-
Expenses	12,000	12,000
Operating Capital Outlay	-	-
Student Financial Assistance	606,571	1,390,302
Expended From Carryforward Balance	10,000	500,000
**Other Category Expenditures	-	-
Total Expenditures:	\$ 1,845,803	\$ 3,928,302
Ending Balance Available:	\$ 649,783	\$ 200,235

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



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

University of South Florida - St. Petersburg							
Undergraduate Students	Actual			Projected			
	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16
Tuition:							
Base Tuition- (0% projected legislative	\$88.59	\$95.67	\$103.32	\$103.32	\$103.32	\$103.32	\$103.32
Tuition Differential (no more than 15%)	\$5.74	\$12.80	\$21.42	\$35.14	\$55.90	\$79.78	\$107.24
Total Base Tuition and Differential	\$94.33	\$108.47	\$124.74	\$138.46	\$159.22	\$183.10	\$210.56
% Change		15.0%	15.0%	11.0%	15.0%	15.0%	15.0%
Fees (per credit hour):							
Student Financial Aid ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Building/Capital Improvement ²	\$4.76	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$10.40	\$24.80	\$24.80	\$25.05	\$25.05	\$25.05	\$25.05
Health	\$0.60	\$1.20	\$2.64	\$3.90	\$3.90	\$3.90	\$3.90
Athletic	\$2.25	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45	\$2.45
Transportation Access	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25	\$2.25
Technology ¹	\$4.42	\$4.78	\$5.16	\$5.16	\$5.16	\$5.16	\$5.16
Student Green Energy (New authority - campus optional)			\$1.00	\$1.00	\$1.00	\$1.00	\$1.00
Sub total (credit hour fees)	\$29.10	\$45.02	\$48.22	\$51.73	\$51.73	\$51.73	\$51.73
Total Tuition and Fees per credit hour	\$123.43	\$153.49	\$172.96	\$190.19	\$210.95	\$234.83	\$262.29
% Change		24.4%	12.7%	10.0%	10.9%	11.3%	11.7%
Fees (block per term):							
Activity & Service							
Health							
Athletic	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
Transportation Access							
Total Block Fees per term	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00	\$5.00
% Change		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.31	\$4,153.91	\$4,776.71	\$5,493.11	\$6,316.91
Total Fees for 30 Credit Hours	\$883.00	\$1,360.60	\$1,456.60	\$1,561.90	\$1,561.90	\$1,561.90	\$1,561.90
Total Tuition and Fees for 30 Credit	\$3,712.90	\$4,614.70	\$5,198.91	\$5,715.81	\$6,338.61	\$7,055.01	\$7,878.81
\$ Change		\$901.80	\$584.21	\$516.90	\$622.80	\$716.40	\$823.80
% Change		24.3%	12.7%	9.9%	10.9%	11.3%	11.7%
Out-of-State Fees							
Out-of-State Undergraduate Fee	\$343.16	\$343.16	\$291.68	\$315.00	\$315.00	\$315.00	\$315.00
Out-of-State Undergraduate Student Fi	\$17.15	\$17.15	\$14.58	\$15.75	\$15.75	\$15.75	\$15.75
Total per credit hour	\$360.31	\$360.31	\$306.26	\$330.75	\$330.75	\$330.75	\$330.75
% Change		0%	-15%	8%	0%	0%	0%
Total Tuition for 30 Credit Hours	\$2,829.90	\$3,254.10	\$3,742.31	\$4,153.91	\$4,776.71	\$5,493.11	\$6,316.91
Total Fees for 30 Credit Hours	\$11,692.30	\$12,169.90	\$10,644.40	\$11,484.40	\$11,484.40	\$11,484.40	\$11,484.40
Total Tuition and Fees for 30 Credit	\$14,522.20	\$15,424.00	\$14,386.71	\$15,638.31	\$16,261.11	\$16,977.51	\$17,801.31
\$ Change		\$901.80	-\$1,037.29	\$1,251.60	\$622.80	\$716.40	\$823.80
% Change		6.2%	-6.7%	8.7%	4.0%	4.4%	4.9%
Housing/Dining							
	\$6,746.00	\$7,420.00	\$7,570.00	\$7,570.00	\$7,570.00	\$7,570.00	\$7,570.00
% Change		10%	2%	0%	0%	0%	0%



ENROLLMENT PLANNING

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

	5 YEAR TREND <i>(2006-07 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)	79%	1,284	37%	1,488	39%	1,518	39%	1,541	39%
FTIC (Profile Admit)	-31%	9	0%	15	0%	16	0%	16	0%
AA Transfers	-2%	1,310	38%	1,474	38%	1,503	38%	1,526	38%
Other Transfers	21%	831	24%	873	24%	890	24%	904	24%
Subtotal	25%	3,434	100%	3,850	100%	3,927	100%	3,987	100%
GRADUATE STUDENTS									
Master's	10%	403	100%	409	100%	417	100%	423	100%
Research Doctoral	n/a	n/a	n/n	n/a	xx%	n/a	xx%	n/a	xx%
Professional Doctoral	n/a	n/a	n/a	n/a	xx%	n/a	xx%	n/a	xx%
Subtotal	10%	403	100%	409	100%	417	100%	423	100%
NOT-DEGREE SEEKING	-27%	220		224		229		232	
MEDICAL	n/a	n/a		n/a		n/a		n/a	
TOTAL	18%	4,057		4,483		4,573		4,642	

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

	5 YEAR TREND <i>(2006-07 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%)	663%	721	28%	858	30%	875	30%	889	30%
HYBRID (50%-79%)	%	0	0%	143	5%	234	8%	296	10%
TRADITIONAL (<50%)	7%	1887	72%	1860	65%	1809	62%	1777	60%
TOTAL	40.2%	2,608	100%	2,861	100%	2,918	100%	2,962	100%
GRADUATE									
DISTANCE (80%)	202%	62	24%	68	25%	72	26%	79	28%
HYBRID (50%-79%)	%	1	.4%	5	2%	14	5%	23	8%
TRADITIONAL (<50%)	-15%	198	76%	198	73%	191	69%	180	64%
TOTAL	3%	261	100%	271	100%	277	100%	282	100%

Note: *Five-yr trends are widely variable for new and emerging instructional programs; USFSP was earning separate accreditation during this time period and distance learning credits may not have been fully differentiated between USF and USFSP. 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	657	1,055	657	1071	1,092	1,108	1,142	6.7%
UPPER DIVISION	1,486	1,692	1,486	1717	1,751	1,777	1,831	6.7%
GRAD I	227	259	227	264	270	275	283	7.2%
GRAD II	0	1	0	n/a	n/a	n/a	n/a	n/a
TOTAL	2,370	3,007	2,370	3,052	3,113	3,160	3,256	6.7%
Not a Florida Resident								
LOWER DIVISION	0	33	0	33	34	35	37	12%
UPPER DIVISION	0	39	0	40	41	42	44	10%
GRAD I	0	7	0	7	7	7	7	0%
GRAD II	0	0	0	n/a	n/a	n/a	n/a	n/a
TOTAL	0	79	0	80	82	84	88	10.0
TOTAL								
LOWER DIVISION	657	1088	657	1,104	1,126	1,143	1,179	6.8%
UPPER DIVISION	1,486	1,731	1,486	1,757	1,792	1,819	1,875	6.7%
GRAD I	227	266	227	271	277	282	290	7.0%
GRAD II	0	1	0	n/a	n/a	n/a x	n/a	n/a
TOTAL	2,370	3,086	2,370	3,132	3,195	3,244	3,344	6.8%
TOTAL (US FTE)	3,160	4,114	3,160	4,175	4,259	4,324	4,558	

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	NA	NA	NA	NA	NA	NA	NA	%
NON-RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
TOTAL	NA	NA	NA	NA	NA	NA	NA	%
Dentistry Headcounts								
FLORIDA RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
NON-RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
TOTAL	NA	NA	NA	NA	NA	NA	NA	%
Veterinary Headcounts								
FLORIDA RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
NON-RESIDENT	NA	NA	NA	NA	NA	NA	NA	%
TOTAL	NA	NA	NA	NA	NA	NA	NA	%



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						
World Languages and Cultures	16.0101	Globalization	UCF	No	50	August 2013

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						
B.A. Marine Science	40.0607 or 26.1302	STEM	All	Partial	50	August 2015

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

Accountancy (Forensic)	52.0301	No	FAU	N	75	August 2015
Non-Profit Leadership and Management	52.0206	No	FAU, UCF, UWF	Partial	30	August 2015
Education Specialist (Special Ed/ESOL)	13.1001	Education	FSU, UF	Partial	30	August 2015

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.