

1-1-2013

2013 Work Plan USF Sarasota-Manatee

USF

Follow this and additional works at: https://digitalcommons.usf.edu/usf_accountability_reports

Scholar Commons Citation

USF, "2013 Work Plan USF Sarasota-Manatee" (2013). *USF Accountability Reports*. 38.
https://digitalcommons.usf.edu/usf_accountability_reports/38

This Article is brought to you for free and open access by the USF Archives at Digital Commons @ University of South Florida. It has been accepted for inclusion in USF Accountability Reports by an authorized administrator of Digital Commons @ University of South Florida. For more information, please contact digitalcommons@usf.edu.

USF

Sarasota-Manatee 2013-14 Work Plan



University of South Florida Sarasota-Manatee

Work Plan Presentation for 2013-14 Board of Governors Review

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



INTRODUCTION

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

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

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

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

Once a Work Plan is approved by each institution's respective Boards of Trustees, the Board of Governors will review and consider the plan for potential acceptance of 2013-14 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 Sarasota-Manatee provides access to professional higher education programs and scholarly research in a personalized living and learning community that graduates successful leaders who empower Florida's Suncoast to thrive locally, nationally, and globally.

VISION STATEMENT (What do you aspire to?)

The University of South Florida Sarasota-Manatee strives to be a hometown comprehensive university with ever-increasing national and global impact.

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 University of South Florida Sarasota-Manatee (USF Sarasota-Manatee) mission is to ensure access to professional higher education, especially to those living in the local Sarasota-Manatee region. The University is pursuing this endeavor through three avenues: 1) partnerships with the State College System; 2) expanding lower-level coursework and admitting an inaugural class of 100 freshmen in Fall Semester 2013; and 3) growing its undergraduate and graduate programs to fill local and statewide needs.

The USF Sarasota-Manatee target markets include Florida College System transfers, returning adult students, and now, with expansion of lower-level courses, local area high school graduates who wish to stay within their community while pursuing a Florida public university education.



STRENGTHS AND OPPORTUNITIES *(within 3 years)*

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

USF Sarasota-Manatee is privileged to provide education that permits students to “learn where they earn,” to participate in regional economic development, to link continuing professional training to maintain workforce competence, and to respond to the higher education needs of a growing population. As a member of the USF System, USF Sarasota-Manatee benefits from the efficiency of shared resources, the opportunity for collaboration with other member institutions, and a unified brand that yields identity and impact. Currently, the University’s steepest challenge is continuing to provide high quality university education amidst declining state support.

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. **Develop freshman and sophomore classes** – The loss of high school graduates from Sarasota, Manatee, and DeSoto counties to pursue higher education in other Florida counties and other states causes a significant brain drain to the local region. Other than the small number attending New College, the rest must leave our community to receive a four-year university education. Lower-level programs at the USF Sarasota-Manatee will enlarge the size of a university-educated workforce and improve quality of life in our Suncoast region. USF Sarasota-Manatee has already begun offering a select few lower-level courses. These lower-level classes have consistently filled, and the number of credits hours generated has increased more than 700% over the past three years.
2. **Develop programs based on their positive potential impact on the local community while also serving state and national educational needs** - Looking to expand offerings in STEM-related fields, USF Sarasota-Manatee has submitted a proposal to offer a bachelor’s of science degree in biology. Course work for this degree program will be partially offered on the campus of Mote Marine Laboratory and will involve instruction and research mentorship by Mote scientists with doctoral degrees.
3. **Continue to improve baccalaureate retention and graduation rates** – In addition to meeting the USF Sarasota-Manatee strategic goal of access, as documented in initiatives 1 and 2 above, the University will also strive to improve the success of students. Several initiatives have already been implemented including the use of an early alert system to identify students at risk who are matched with services to assist and support their achievement. USF Sarasota-Manatee leverages technology to improve student-learning outcomes and uses tuition differential funds to open additional undergraduate course sections, which can improve rates of graduation. When the freshmen arrive in the fall, they will attend two days of orientation as well as enroll in an undergraduate student success course as part of their general education.



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 (2006-07 to 2011-12)	2011-12 ACTUAL	2012-13 ESTIMATES	2013-14 GOALS	3 YEAR GOALS (2015-16)
Academic Quality					
National Ranking for University and Programs					
Describe plans for increasing national preeminence of University and select programs.					
Avg. SAT Score (for 3 subtests)	n/a	n/a	n/a	1,600	1,640
Avg. High School GPA	n/a	n/a	n/a	3.3	3.5
Professional/Licensure Exam First-time Pass Rates²					
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 2013.			
SUBTOTAL OF IMPROVING METRICS	n/a	n/a	n/a	n/a	2/2
Operational Efficiency					
Freshman Retention Rate	n/a	n/a	n/a	n/a	82%
FTIC Graduation Rates					
In 4 years (or less)	n/a	n/a	n/a	n/a	n/a
In 6 years (or less)	n/a	n/a	n/a	n/a	n/a
AA Transfer Graduation Rates					
In 2 years (or less)	1%Δ	31%	32%	33%	37%
In 4 years (or less)	-9%Δ	60%	62%	63%	66%
Percent of Bachelor's Degrees Without Excess Hours		60%	61%	62%	63%
Average Time to Degree (for FTIC)	n/a	n/a	n/a	n/a	n/a
SUBTOTAL OF IMPROVING METRICS	1/2	3/3	3/3	3/3	4/4
Return on Investment					
Bachelor's Degrees Awarded	34%Δ	521	524	555	623
Percent of Bachelor's Degrees in STEM	2%Δ	3%	4%	4%	6%
Graduate Degrees Awarded	-16%Δ	72	58	61	66
Percent of Graduate Degrees in STEM	n/a	n/a	n/a	n/a	n/a
Percent of Baccalaureate Graduates Employed in Florida	n/a	75% ³	75%	76%	77%
Percent of Baccalaureate Graduates Continuing their Education (in FL)	n/a	14% ³	15%	16%	19%
Annual Gifts Received (\$M)⁴	n/a	Data reported in the USF Work Plan			
Endowment (\$M)⁴	n/a	Data reported in the USF Work Plan			
SUBTOTAL OF IMPROVING METRICS	2/3	3/5	4/5	4/5	5/5
TOTAL OF IMPROVING METRICS	3/5	6/8	7/8	7/8	11/11

Notes: (1) SAT trends are based on 4 years, (2) Professional licensure pass rates are based on the 2011-12 Annual Accountability Report with data that spans multiple time periods, (3) Percent of graduates employed and continuing their education is based on 2010-11 data from FETPIP.



KEY PERFORMANCE INDICATORS

Goals Specific to Research Universities

	5 YEAR TREND (2005-06 to 2010-11)	2011-12 ACTUAL ¹	2012-13 ESTIMATES	2013-14 GOALS	3 YEAR GOALS (2015-16)
Academic Quality					
Faculty Awards*	0%Δ	0	0	1	2
National Academy Members	n/a	n/a	n/a	n/a	n/a
Number of Post-Doctoral Appointees	n/a	n/a	n/a	n/a	n/a
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	n/a	n/a	n/a	n/a
SUBTOTAL OF IMPROVING METRICS	n/a		n/a	1/1	1/1
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>	n/a	n/a	n/a	n/a	n/a
Science & Engineering Research Expenditures (\$M)	n/a	n/a	n/a	n/a	n/a
Science & Engineering R&D Expenditures in Non-Medical/Health Sciences (\$M)	n/a	n/a	n/a	n/a	n/a
Percent of Research Expenditures funded from External Sources	n/a	n/a	n/a	n/a	n/a
Patents Issued	n/a	n/a	n/a	n/a	n/a
Licenses/Options Executed	n/a	n/a	n/a	n/a	n/a
Licensing Income Received (\$M)	n/a	n/a	n/a	n/a	n/a
Number of Start-up Companies	n/a	n/a	n/a	n/a	n/a
National Rank is Higher than Predicted by the Financial Resources Ranking <i>(based on U.S. News & World Report)</i>	n/a	n/a	n/a	n/a	n/a
Research Doctoral Degrees Awarded	n/a	n/a	n/a	n/a	n/a
Professional Doctoral Degrees Awarded	n/a	n/a	n/a	n/a	n/a
SUBTOTAL OF IMPROVING METRICS	n/a		n/a	n/a	n/a
TOTAL OF IMPROVING METRICS	n/a		n/a	1/1	1/1

*USF Sarasota-Manatee is not a research university. However, we wanted to report our Fulbright Scholar.



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
Bachelor's Degrees Awarded to Minorities	Number of Faculty Designated a Highly Cited Scholar
Number of Adult (age 25+) Undergraduates Enrolled	Seek and/or Maintain Carnegie's Community Engagement Classification (narrative goal)
Percent of Course Sections Offered via Distance and Blended Learning	Percentage of Students Participating in Identified Community and Business Engagement Activities
	Enrollment in Professional Training and Continuing Education Courses

	5 YEAR TREND (2006-07 to 2011-12)	2011-12 ACTUAL	2012-13 ESTIMATES	2013-14 GOALS	3 YEAR GOALS (2015-16)
Metric #1 Number of Adult (age 25+) Undergraduates Enrolled	27%Δ	954	1035	1081	1181
Metric #2 Percent of Course Sections Offered via Distance and Blended Learning	31%Δ	38%	45%	45%	47%
Metric #3 Seek and/or Maintain Carnegie's Community Engagement classification	USF Sarasota-Manatee will register to receive the Elective Community Engagement Classification in May 2013, the next open registration period. According to the Carnegie Foundation timeline, this would allow for designation in January 2015.				

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. Student Access: *Expand access to University education that benefits students and the local, national, and global community.*

Metric: Students Served	-0.2%Δ	4,510	4,496	4,699	5,130
-------------------------	--------	-------	-------	-------	-------

Goal 2. Student Success: *Enhance success of student outcomes, faculty productivity, and community impact.*

Metric: 4y AA Success Rate* (retained or graduated)	-16%Δ	62%	62%	65%	75%
---	-------	-----	-----	-----	-----

*In Fall 2009, USF Tampa mandated that any USF Sarasota-Manatee student in a degree program hosted by USF Tampa or not offered completely by USF Sarasota-Manatee be removed from USF Sarasota-Manatee Home Campus enrollment numbers. As a result of the mandate, USF Sarasota-Manatee graduation and retention rates were negatively affected.



OPERATIONS



FISCAL INFORMATION

University Revenues *(in Millions of Dollars)*

	2008-09 Actual	2009-10 Actual	2010-11 Actual	2011-12 Actual	2012-13 Actual	2013-14 Appropriations
Education & General – Main Operations						
State Funds	\$ 14.1	\$ 13.1	\$ 12.9	\$ 11.2	\$ 10.1	n/a
Tuition	\$ 4.8	\$ 5.4	\$ 6.3	\$ 6.9	\$ 8.9	n/a
TOTAL MAIN OPERATIONS	\$ 18.9	\$ 18.5	\$ 19.2	\$ 18.1	\$ 19.0	n/a
EDUCATION & GENERAL TOTAL REVENUES	\$ 18.9	\$ 18.5	\$ 19.2	\$ 18.3	\$ 19.0	n/a

Note: State funds include General Revenue funds, Lottery funds, Federal Stimulus funds, and Phosphate Research funds (for Polytechnic) appropriated by the Florida Legislature (as reported in the Annual Accountability Report). Actual tuition includes base tuition and tuition differential fee revenues for resident and non-resident undergraduate and graduate students net of waivers (as reported in the Annual Accountability Report). Actual tuition revenues are not yet available for the 2013-14 year.

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	Previously reported only at the USF System Level	\$ 1.8	\$ 1.8	n/a
----------	--	--------	--------	-----

Contracts & Grants

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

Revenues	Previously reported only at the USF System Level	\$.2	\$.3	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	Previously reported only at the USF System Level	\$1.1	\$ 1.2	n/a
----------	--	-------	--------	-----

Faculty Practice Plans

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

Revenues	Reported at USF System Level			n/a
----------	------------------------------	--	--	-----

OTHER BUDGET ENTITY TOTAL REVENUES		\$ 3.2	\$ 3.4	n/a
UNIVERSITY REVENUES GRAND TOTAL		\$21.5	\$ 22.4	n/a



FISCAL INFORMATION (continued)

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

	FY 2011-12 ACTUAL	FY 2012-13 ACTUAL	FY 2013-14 REQUEST	FY 2014-15 PLANNED	FY 2015-16 PLANNED
Base Tuition	\$3,100	\$3,100	\$3,152	\$3,152	\$3,152
Tuition Differential Fee	\$643	\$1,054	\$1,054	\$1,054	\$1,054
Percent Increase	15%	11%	1.3%	0%	0%
Required Fees¹	\$1,316	\$1,376	\$1,381	\$1,381	\$1,381
TOTAL TUITION AND FEES	\$5,059	\$5,530	\$5,587	\$5,587	\$5,587

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

Student Debt Summary

	2008-09 ACTUAL	2009-10 ACTUAL	2010-11 ACTUAL	2011-12 ACTUAL	2012-13 ESTIMATE
Percent of Bachelor's Recipients with Debt	n/a	n/a	n/a	n/a	n/a
Average Amount of Debt <i>for Bachelor's who have graduated with debt</i>	n/a	n/a	n/a	n/a	n/a
Student Loan Cohort Default Rate (2nd Year)*	7.0%	6.8%	5.5% <i>draft</i>	n/a	n/a
Student Loan Cohort Default Rate (3rd Year)*	9.8%	n/a	n/a	n/a	n/a

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

*USF System data

Cost of Attendance *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2012-13)*

	TUITION & FEES	BOOKS & SUPPLIES	ROOM & BOARD	TRANSPORTATION	OTHER EXPENSES	TOTAL
ON-CAMPUS				N/A		
AT HOME	\$5,530	\$1,000	\$4,480	\$1,600	\$2,500	\$15,110

Estimated Net Cost by Family Income *(for Full-Time Undergraduate Florida Residents in the Fall and Spring of 2012-13)*

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	246	54%	\$12,813	-\$1,129	\$5,977	\$5,700
\$40,000-\$59,999	46	10%	\$13,908	\$747	\$4,113	\$4,108
\$60,000-\$79,999	39	9%	\$15,423	\$2,917	\$2,089	\$5,083
\$80,000-\$99,999	31	7%	\$15,090	\$3,336	\$1,566	\$4,236
\$100,000 Above	49	10%	\$15,250	\$3,431	\$1,673	\$3,288
Missing	46	10%	\$19,259	\$4,694	\$218	\$174
TOTAL	457	100%	AVERAGE \$14,211	\$749	\$4117	\$4573

Notes: This data only represents Fall and Spring financial aid data and is accurate as of March 31, 2013. Please note that small changes to Spring 2013 awards are possible before the data is finalized. **Family Income Groups** are based on the Total Family Income (including untaxed income) as reported on student FAFSA records. **Full-time Students** is a headcount based on at least 24 credit hours during Fall and Spring terms. **Average Gift Aid** includes all grants and scholarships from Federal, State, University and other private sources administered by the Financial Aid Office. Student waivers are also included in the Gift Aid amount. Gift Aid does not include the parental contribution towards EFC. **Net Cost of Attendance** is the actual average of the total Costs of Attendance (which will vary by income group due to the diversity of students living on- & off- campus) *minus* the average Gift Aid amount. **Net Tuition & Fees** is the actual average of the total costs of tuition and fees (which will vary by income group due to the amount of credit hours students are enrolled) *minus* the average Gift Aid amount (see page 16 for list of fees that are included). **Average Loan Amount** includes Federal (Perkins, Stafford, Ford Direct, and PLUS loans) and all private loans. The bottom-line **Average** represents the average of all full-time undergraduate Florida residents.



FISCAL INFORMATION (continued) TUITION DIFFERENTIAL FEE INCREASE REQUEST FOR FALL 2013

Effective Date	
University Board of Trustees approval date:	
Campus or Center Location	
Campus or center location to which the tuition differential fee increase 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, provide rationale for the differentiation among courses):	
Current and Proposed Increase in the Tuition Differential Fee	
Current Undergraduate Tuition Differential per credit hour:	\$35.14
Percentage tuition differential fee increase (calculated as a percentage of the sum of base tuition plus tuition differential):	0%
\$ Increase in tuition differential per credit hour:	0
\$ Increase in tuition differential for 30 credit hours:	0
Projected Differential Revenue Generated	
Incremental revenue generated in 2013-14 (projected)	0
Total differential fee revenue generated in 2013-14 (projected):	\$1,769,088
Intended Uses	
Describe the Impact to the Institution if Tuition Differential is Not Approved	
Request to Modify or Waive Tuition Differential Uses (pursuant to Section 1001.706(3)(g) the Board may consider waiving its regulations associated with the 70% / 30% intended uses criteria identified in Regulation 7.001(14). If the university requests a modification; identify the modification, purpose of the modification, and rationale for the modification.)	



FISCAL INFORMATION (continued) TUITION DIFFERENTIAL SUPPLEMENTAL INFORMATION

Provide the following information for the 2012-13 academic year.

2012-2013 -60% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Enhance timely college completion rates.	281 course sections were funded. 2-year graduation rates of AA transfers increased 1% over last year. 4-year graduation rates of AA transfers increased 2% over last year.
Additional Detail, where applicable:	
Total Number of Faculty Hired or Retained (funded by tuition differential):	99
Total Number of Advisors Hired or Retained (funded by tuition differential):	0
Total Number of Course Sections Added or Saved (funded by tuition differential):	281
2012-2013 - 40% Initiatives (list the initiatives provided in the 2012-13 tuition differential request)	University Update on Each Initiative
Expand access for students and accelerated path to graduation	This initiative was for students entering USF as freshmen, so Sarasota-Manatee students were not considered.
Provide financial support for talented students with limited income	Larger USF need based grant awards were made to students based on their academic potential and USF academic record.
More students supported with financial aid scholarships and reduced loan indebtedness	The number of students receiving a need based grant increased to 298 from 265, or by 12%.
Additional Information (estimates as of April 30, 2013):	
Unduplicated Count of Students Receiving at least one Tuition Differential-Funded Award:	298
\$ Mean (per student receiving an award) of Tuition Differential-Funded Awards:	1,007
\$ Minimum (per student receiving an award) of Tuition Differential-Funded Awards:	250
\$ Maximum (per student receiving an award) of Tuition Differential-Funded Awards:	2,000



FISCAL INFORMATION (continued)
TUITION DIFFERENTIAL COLLECTIONS, EXPENDITURES,
& AVAILABLE BALANCES - FISCAL YEAR 2012-13 AND 2013-14

University Tuition Differential		
Budget Entity: 48900100 (Educational & General)		
SF/Fund: 2 164xxx (Student and Other Fees Trust Fund)		
	Estimated Actual*	Estimated
	2012-13	2013-14
	-----	-----
<u>FTE Positions:</u>		
Faculty	59.83	68.00
Advisors	.	
Staff	.	
Total FTE Positions:	59.83	68.00
<u>Balance Forward from Prior Periods</u>		
Balance Forward	\$ 64,385	\$ 6,617
Less: Prior-Year Encumbrances	-	-
Beginning Balance Available:	\$ -	\$ -
<u>Receipts / Revenues</u>		
Tuition Differential Collections	\$ 1,545,567	1,769,088
Interest Revenue - Current Year	1,332	1,521
Interest Revenue - From Carryforward Balance	-	-
Total Receipts / Revenues:	\$ 1,546,899	\$ 1,770,609
<u>Expenditures</u>		
Salaries & Benefits	\$ 272,896	\$ 1,172,658
Other Personal Services	744,985	-
Expenses	-	-
Operating Capital Outlay	-	-
Student Financial Assistance	522,402	597,951
Expended From Carryforward Balance	-	-
**Other Category Expenditures	-	-
Total Expenditures:	\$ 1,540,283	\$ 1,770,609
Ending Balance Available:	\$ 6,617	\$ -
<u>Balance Forward from Prior Periods</u>		
*Since the 2012-13 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 - Sarasota-Manatee

<u>Undergraduate Students</u>	-----Actual-----			-----Projected-----				
	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16	2016-17	2017-18
Tuition:								
Base Tuition - (0% projected legislative increase)	\$95.67	\$103.32	\$103.32	\$105.07	\$105.07	\$105.07	\$105.07	\$105.07
Tuition Differential (no more than 15%)	\$12.80	\$21.42	\$35.14	\$35.14	\$35.14	\$35.14	\$35.14	\$35.14
Total Base Tuition and Differential	\$108.47	\$124.74	\$138.46	\$140.21	\$140.21	\$140.21	\$140.21	\$140.21
% Change	15.0%	15.0%	11.0%	1.3%	0.0%	0.0%	0.0%	0.0%
Fees (per credit hour):								
Student Financial Aid ¹	\$4.78	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Building/Capital Improvement ²	\$4.76	\$4.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76	\$6.76
Activity & Service	\$20.19	\$20.19	\$20.19	\$20.19	\$20.19	\$20.19	\$20.19	\$20.19
Health	\$4.03	\$4.03	\$4.03	\$4.03	\$4.03	\$4.03	\$4.03	\$4.03
Athletic	\$4.23	\$4.23	\$4.23	\$4.23	\$4.23	\$4.23	\$4.23	\$4.23
Transportation Access								
Technology ¹	\$4.78	\$5.16	\$5.16	\$5.25	\$5.25	\$5.25	\$5.25	\$5.25
Sub total (credit hour fees)	\$42.77	\$43.53	\$45.53	\$45.71	\$45.71	\$45.71	\$45.71	\$45.71
Total Tuition and Fees per credit hour	\$151.24	\$168.27	\$183.99	\$185.92	\$185.92	\$185.92	\$185.92	\$185.92
% Change	24.1%	11.3%	9.3%	1.0%	0.0%	0.0%	0.0%	0.0%
Fees (block per term):								
Activity & Service								
Health								
Athletic	\$5.00	\$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	\$5.00
% Change	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,254.10	\$3,742.20	\$4,153.80	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30
Total Fees for 30 Credit Hours	\$1,293.10	\$1,315.90	\$1,375.90	\$1,381.30	\$1,381.30	\$1,381.30	\$1,381.30	\$1,381.30
Total Tuition and Fees for 30 Credit Hours	\$4,547.20	\$5,058.10	\$5,529.70	\$5,587.60	\$5,587.60	\$5,587.60	\$5,587.60	\$5,587.60
\$ Change	\$881.70	\$510.90	\$471.60	\$57.90	\$0.00	\$0.00	\$0.00	\$0.00
% Change	24.1%	11.2%	9.3%	1.0%	0.0%	0.0%	0.0%	0.0%
Out-of-State Fees								
Out-of-State Undergraduate Fee	\$343.16	\$291.68	\$315.00	\$346.50	\$346.50	\$346.50	\$346.50	\$346.50
Out-of-State Undergraduate Student Financial Aid ³	\$17.15	\$14.58	\$15.75	\$17.32	\$17.32	\$17.32	\$17.32	\$17.32
Total per credit hour	\$360.31	\$306.26	\$330.75	\$363.82	\$363.82	\$363.82	\$363.82	\$363.82
% Change	0%	-15%	8%	10.0%	0.0%	0.0%	0.0%	0.0%
Total Tuition for 30 Credit Hours	\$3,254.10	\$3,742.20	\$4,153.80	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30	\$4,206.30
Total Fees for 30 Credit Hours	\$12,102.40	\$10,503.70	\$11,298.40	\$12,295.90	\$12,295.90	\$12,295.90	\$12,295.90	\$12,295.90
Total Tuition and Fees for 30 Credit Hours	\$15,356.50	\$14,245.90	\$15,452.20	\$16,502.20	\$16,502.20	\$16,502.20	\$16,502.20	\$16,502.20
\$ Change	\$881.70	-\$1,110.60	\$1,206.30	\$1,050.00	\$0.00	\$0.00	\$0.00	\$0.00
% Change	6.1%	-7.2%	8.5%	6.8%	0.0%	0.0%	0.0%	0.0%



ENROLLMENT PLANNING

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

	5 YEAR TREND (2006-07 to 2011-12)	2011-12 ACTUAL HEADCOUNT		2013-14 PLANNED HEADCOUNT		2014-15 PLANNED HEADCOUNT		2015-16 PLANNED HEADCOUNT	
UNDERGRADUATE									
FTIC (Regular Admit)	n/a	0	0%	95	5%	152	7%	159	7%
FTIC (Profile Admit)	n/a	0	0%	5	0%	8	0%	8	0%
AA Transfers*	35%Δ	1,182	74%	1,324	70%	1,384	68%	1,446	68%
Other Transfers	5%Δ	423	26%	465	25%	486	24%	508	24%
Subtotal	26%Δ	1,605	100%	1,889	100%	2,030	100%	2,121	100%
GRADUATE STUDENTS									
Master's	-46%Δ	159	100%	146	100%	153	100%	160	100%
Research Doctoral	n/a	0	0%	0	xx%	0	0%	0	0%
Professional Doctoral	n/a	0	0%	0	xx%	0	0%	0	0%
Subtotal	n/a	159	100%	0	100%	153	100%	160	100%
NOT-DEGREE SEEKING	-46%Δ	155		104		110		114	
MEDICAL	n/a	0		0		0		0	
TOTAL	11%Δ	1,919		2,139		2,292		2,395	

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

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

	5 YEAR TREND (2006-07 to 2011-12)	2011-12		2013-14		2014-15		2015-16	
		ACTUAL FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL	PLANNED FTE	% of TOTAL
UNDERGRADUATE									
DISTANCE (>80%)	230%Δ	491	45%	565	48%	609	49%	632	49%
HYBRID (50%-79%)	%Δ	33	3%	47	4%	62	5%	77	6%
TRADITIONAL (<50%)	-5%Δ	566	52%	565	48%	571	46%	580	45%
TOTAL	47%Δ	1090	100%	1177	100%	1242	100%	1289	100%
GRADUATE									
DISTANCE (80%)	246%Δ	20	18%	18	18%	19	18%	21	19%
HYBRID (50%-79%)	%Δ	4	4%	4	4%	5	5%	7	6%
TRADITIONAL (<50%)	-46%Δ	87	78%	80	78%	82	77%	84	75%
TOTAL	-34%Δ	111	100%	102	100%	107	100%	112	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 2012-13	Estimated Actual 2012-13	Funded 2013-14	1st Year Estimated 2013-14	2nd Year Planned 2014-15	3rd Year Planned 2015-16	4th Year Planned 2016-17	5th Year Planned 2017-18	5-Year Projected Average Annual Growth Rate
Florida Resident									
LOWER	0	133	0	172	191	200	204	214	12.2%
UPPER	798	931	798	977	1021	1067	1115	1165	5.0%
GRAD I	182	92	182	97	102	106	110	115	4.9%
GRAD II	0	0	0	0	0	0	0	0	0.0%
TOTAL	980	1156	980	1246	1314	1373	1429	1494	5.9%
Non- Resident									
LOWER	0	9	0	8	9	9	14	14	10.4%
UPPER	0	19	0	20	21	22	23	24	5.0%
GRAD I	0	6	0	5	5	6	7	7	4.4%
GRAD II	0	0	0	0	0	0	0	0	0.0%
TOTAL	0	34	0	33	35	37	44	45	6.3%
TOTAL									
LOWER	0	142	0	180	200	209	218	228	12.1%
UPPER	798	950	798	997	1042	1089	1138	1189	5.0%
GRAD I	182	98	182	102	107	112	117	122	4.9%
GRAD II	0	0	0	0	0	0	0	0	0.0%
TOTAL	980	1190	980	1279	1349	1410	1473	1539	5.9%
TOTAL (US FTE)	1306	1541	1306	1661	1752	1831	1906	1992	5.9%

Medical Student Headcounts *(FTE does not apply)*

Medical Doctorate									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	xx	%
Dentistry									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	xx	%
Veterinary									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	xx	%
Pharmacy									
FLORIDA RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
NON-RESIDENT	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	%
TOTAL	xx	xx	xx	xx	xx	xx	xx	xx	%



ACADEMIC PROGRAM COORDINATION

New Programs To Be Considered by University in 2013-14 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.S. Biology	26.0101	STEM	FAMU, FAU, FGCU, FIU, UCF, UF, USFT, USFSP, UWF	NO	192	June-2013

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

DOCTORAL PROGRAMS

New Programs To Be Considered by University in 2014-16 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						
Operations Research & Management	52.0205	N/A	None	No	50	Mar-2015

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

Communication Sciences and Disorders	51.0201	N/A	None	Yes	50	Mar-2015
Social Science Education	13.1317	N/A	FSU, USFT, UWF	No	40	Mar-2015

DOCTORAL PROGRAMS



KEY PERFORMANCE INDICATOR DEFINITIONS

Goals Common to All Universities	
Academic Quality	
National Ranking for University and Program(s)	Describe plans for increasing national preeminence of University and select programs.
Avg. SAT Score (for 3 subtests)	The average SAT score for all three subtests (reading, mathematics and writing) for Admitted & Registered FTIC (B,E) students (Fall only).
Avg. HS GPA	The average HS GPA for Admitted & Registered FTIC and early admit (B,E) students. Max score is 5.0.
Professional/Licensure Exam First-time Pass Rates 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 2011-12 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 2013 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 as reported in the 2011-12 Accountability report (table 4B) – see link .
FTIC Graduation Rates In 4 years (or less) In 6 years (or less)	As reported in the 2011-12 Accountability report (table 4D), First-time-in-college (FTIC) cohort is defined as undergraduates entering in fall term (or summer continuing to fall) with fewer than 12 hours earned since high school graduation. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the fourth or sixth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
AA Transfer Graduation Rates In 2 years (or less) In 4 years (or less)	As reported in the 2011-12 Accountability report (table 4E), AA Transfer cohort is defined as undergraduates entering in the fall term (or summer continuing to fall) and having earned an AA degree from an institution in the Florida College System. The rate is the percentage of the initial cohort that has either graduated from or is still enrolled in the <u>same</u> institution by the second or fourth academic year. Both full-time and part-time students are used in the calculation. The initial cohort is revised to remove students, who have allowable exclusions as defined by IPEDS, from the cohort.
Percent of Bachelor's Degrees Without Excess Hours	As reported in the 2011-12 Accountability report (table 4J), the percentage of baccalaureate degrees awarded within 110% of the hours required for a degree. This metric computes total academic credit (minus exemptions per 1009.286, F.S.) as a percentage of catalog hours required for the students major.
Average Time to Degree (for FTIC)	This metric is the number of years between the start date (using the student's entry date) and the end date (using the last month in the term degree was granted) for a graduating class of first-time, single-major baccalaureates in 120 credit hour programs within a (Summer, Fall, Spring) year. The student type is based on student type at time of entry.



Return on Investment	
Bachelor's Degrees Awarded	This is a count of baccalaureate degrees awarded as reported in the 2011-12 Accountability Report (table 4G) – see link .
Percent of Bachelor's Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2011-12 Accountability Report (table 4H) – see link .
Graduate Degrees Awarded	This is a count of graduate degrees awarded as reported in the 2011-12 Accountability Report (table 5B) – see link .
Percent of Graduate Degrees in STEM	The percentage of baccalaureate degrees that are classified as STEM by the Board of Governors in the SUS program inventory as reported in the 2011-12 Accountability Report (table 5C) – see link .
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 – see link .
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 – see link .
Annual Gifts Received (\$M)	As reported in the Council for Aid to Education's Voluntary Support of Education (VSE) survey in the section entitled "Gift Income Summary," this is the sum of the present value of all gifts (including outright and deferred gifts) received for any purpose and from all sources during the fiscal year, excluding pledges and bequests. (There's a deferred gift calculator at www.cae.org/vse .) The present value of non-cash gifts is defined as the tax deduction to the donor as allowed by the IRS.
Endowment (\$M)	Endowment value at the end of the fiscal year, as reported in the annual NACUBO Endowment Study (changed to the NACUBO-Common Fund Study of Endowments in 2009).
Goals Specific to Research Universities	
Academic Quality	
Faculty Awards	Awards include: American Council of Learned Societies (ACLS) Fellows, Beckman Young Investigators, Burroughs Wellcome Fund Career Awards, Cottrell Scholars, Fulbright American Scholars, Getty Scholars in Residence, Guggenheim Fellows, Howard Hughes Medical Institute Investigators, Lasker Medical Research Awards, MacArthur Foundation Fellows, Andrew W. Mellon Foundation Distinguished Achievement Awards, National Endowment for the Humanities (NEH) Fellows, National Humanities Center Fellows, National Institutes of Health (NIH) MERIT, National Medal of Science and National Medal of Technology, NSF CAREER awards (excluding those who are also PECASE winners), Newberry Library Long-term Fellows, Pew Scholars in Biomedicine, Presidential Early Career Awards for Scientists and Engineers (PECASE), Robert Wood Johnson Policy Fellows, Searle Scholars, Sloan Research Fellows, Woodrow Wilson Fellows. As reported by the Top American Research Universities – see link .
National Academy Members	The number of National Academy members included in the National Academy of Sciences, National Academy of Engineering, and the Institute of Medicine. As reported by the Top American Research Universities – see link .
Number of Post-Doctoral appointees	As submitted to the National Science Foundation Survey of Graduate Students and Postdoctorates in Science & Engineering (also known as the GSS) – see link .



Number of Science & Engineering Disciplines nationally ranked in Top 100 for research expenditures	The number of Science & Engineering disciplines the university ranks in the top 100 (for public and private universities) based on the National Science Foundation's annual survey for R&D expenditures, which identifies 8 broad disciplines within Science & Engineering (Computer Science, Engineering, Environmental Science, Life Science, Mathematical Sciences, Physical Sciences, Psychology, and Social Sciences). Historically NSF provided these rankings (see tables 45-61 at link), but now data must be queried via WebCASPAR – see link .
Return on Investment	
Total Research Expenditures (\$M)	Total expenditures for all research activities (including non-science and engineering activities) as reported on the NSF annual survey and the 2011-12 Accountability Report – see link .
Science & Engineering Research Expenditures in non-medical/health sciences	This metric reports the Science & Engineering total R&D expenditures minus the research expenditures for medical sciences as reported by the National Science Foundation. Historically NSF provided these data (see link , table 36 <i>minus</i> table 52), but now data must be queried via WebCASPAR – see link .
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) as reported in the 2011-12 Accountability Report (table 6A) – see link .
Patents Issued	The number of patents issued in the fiscal year as reported in the 2011-12 Accountability Report (table 6A) – see link .
Licenses/Options Executed	Licenses/options executed in the fiscal year for all technologies as reported in the 2011-12 Accountability Report (table 6A) – see link .
Licensing Income Received (\$M)	License issue fees, payments under options, annual minimums, running royalties, termination payments, amount of equity received when cashed-in, and software and biological material end-user license fees of \$1,000 or more, but not research funding, patent expense reimbursement, valuation of equity not cashed-in, software and biological material end-user license fees of less than \$1,000, or trademark licensing royalties from university insignia. Data as reported in the 2011-12 Accountability Report (table 6A) – see link .
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 2011-12 Accountability Report (table 6A) – see link .
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 as reported in the 2011-12 Accountability Report (table 5B) – see link .
Professional Doctoral Degrees Awarded	The number of professional doctoral degrees awarded annually as reported in the 2011-12 Accountability Report (table 5B) – see link .