

<b>Tab 1</b>	<b>SB 4</b> by <b>Galvano (CO-INTRODUCERS) Bradley, Perry, Young, Stewart, Stargel, Simpson</b> ; Higher Education
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<b>Tab 2</b>	<b>SB 88</b> by <b>Hukill (CO-INTRODUCERS) Latvala, Rouson, Baxley, Benacquisto, Stewart, Rodriguez, Mayfield, Farmer, Book</b> ; High School Graduation Requirements
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**The Florida Senate**  
**COMMITTEE MEETING EXPANDED AGENDA**

**EDUCATION**  
**Senator Hukill, Chair**  
**Senator Mayfield, Vice Chair**

**MEETING DATE:** Monday, October 9, 2017  
**TIME:** 3:30—6:00 p.m.  
**PLACE:** *Pat Thomas Committee Room, 412 Knott Building*

**MEMBERS:** Senator Hukill, Chair; Senator Mayfield, Vice Chair; Senators Book, Farmer, Galvano, Lee, Perry, Simmons, Simpson, Stewart, and Thurston

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
1	<b>SB 4</b> Galvano	Higher Education; Citing this act as the "Florida Excellence in Higher Education Act of 2018"; establishing the World Class Faculty and Scholar Program; authorizing state university investments in certain faculty retention, recruitment, and recognition activities; establishing the State University Professional and Graduate Degree Excellence Program; authorizing a student to use Florida Bright Futures Scholarship Program awards for summer term enrollment; extending coverage of the Benacquisto Scholarship Program to include tuition and fees for qualified nonresident students, etc.  ED 09/12/2017 ED 10/09/2017 Favorable AHE AP	Favorable Yeas 9 Nays 0
2	<b>SB 88</b> Hukill	High School Graduation Requirements; Revising the requirements for the Next Generation Sunshine State Standards to include financial literacy; revising the required credits for a standard high school diploma to include one-half credit of instruction in personal financial literacy and money management and seven and one-half, rather than eight, credits in electives, etc.  ED 09/12/2017 ED 10/09/2017 Fav/CS AED AP	Fav/CS Yeas 9 Nays 0
3	Presentation: Emergency Coordination Efforts of State and Local Entities		Presented

Other Related Meeting Documents

**The Florida Senate**  
**BILL ANALYSIS AND FISCAL IMPACT STATEMENT**

(This document is based on the provisions contained in the legislation as of the latest date listed below.)

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Prepared By: The Professional Staff of the Committee on Education

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BILL: SB 4

INTRODUCER: Senators Galvano and Bradley

SUBJECT: Higher Education

DATE: October 6, 2017

REVISED: \_\_\_\_\_

	ANALYST	STAFF DIRECTOR	REFERENCE	ACTION
1.	Bouck	Graf	ED	<b>Favorable</b>
2.			AHE	
3.			AP	

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**I. Summary:**

SB 4 establishes the “Florida Excellence in Higher Education Act of 2018” to help students access higher education and graduate on time. Specifically, the bill:

- Increases student financial aid and tuition assistance programs in the following ways:
  - Expands the Florida Bright Futures Scholarship Program Academic Scholars award to cover 100 percent of tuition and specified fees plus \$300 for textbooks, and authorize use of the award for summer term enrollment as funded in the General Appropriations Act.
  - Expands the Florida Bright Futures Scholarship Program Medallion Scholars award to an amount equal to 75 percent of tuition and specified fees to pay for educational expenses.
  - Extends the Benacquisto Scholarship Program to eligible students from out of state.
  - Revises the state-to-private match requirements for contributions to the First Generation Matching Grant Program from 1:1 to 2:1.
  - Establishes the Florida Farmworker Student Scholarship Program for farmworkers and the children of farmworkers.
  - Requires each state university board of trustees to adopt, for implementation in the fall 2018 semester, a block tuition policy for full-time, first-time-in-college students.
- Modifies state university performance accountability metrics to promote on-time student graduation in 4 years.
- Establishes the World Class Faculty and Scholar Program to fund and support the efforts of state universities to recruit and retain exemplary faculty and research scholars.
- Establishes the State University Professional and Graduate Degree Excellence Program to enhance the quality of schools and degree programs in medicine, law, and business.
- Requires state universities to use data-driven gap analyses to identify internship opportunities in high-demand fields for students.
- Strengthens accountability of state university direct-support organizations.

The bill takes effect upon becoming a law.

## II. Present Situation:

The present situation for the relevant portions of the bill is discussed in the Effect of Proposed Changes section of this bill analysis.

## III. Effect of Proposed Changes:

The State University System of Florida (SUS) is established to achieve excellence through teaching students, advancing research, and providing public service for the benefit of Florida's citizens, their communities and economies.<sup>1</sup> The Board of Governors of the State University System (BOG) must support, promote, and enhance accountability; fiscal responsibility; articulation among state universities and with public schools and other postsecondary educational institutions; and affordable access to postsecondary educational opportunities for Florida residents.<sup>2</sup>

SB 4 expands financial aid and tuition assistance programs to address financial insecurity concerns of students and their families and assist students to graduate on time. The bill also provides supports to enhance the national competitiveness of the state universities in Florida and modifies state university accountability mechanisms to emphasize on-time student graduation and institutional transparency.

### **Access and Affordability**

The Legislature has established various student financial aid and tuition assistance programs to assist students in accessing and pursuing higher education in Florida.

### ***Florida Bright Futures Scholarship Program***

#### *Present Situation*

The Florida Bright Futures Scholarship (Bright Futures) Program was established in 1997<sup>3</sup> as a lottery-funded scholarship program to reward a Florida high school graduate who merits recognition for high academic achievement. The student must enroll in a degree program, certificate program, or applied technology program at an eligible public or private postsecondary education institution<sup>4</sup> in Florida after graduating from high school.<sup>5</sup> The Bright Futures program consists of three types of awards:<sup>6</sup>

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<sup>1</sup> Art. IX, Sec. 7(a), Fla. Const.

<sup>2</sup> Section 20.155(4)(b), F.S.

<sup>3</sup> Section 2, ch. 1997-77, L.O.F.

<sup>4</sup> A student who receives any award under the Florida Bright Futures Scholarship Program, who is enrolled in a nonpublic postsecondary education institution, and who is assessed tuition and fees that are the same as those of a full-time student at that institution, receives a fixed award calculated by using the average tuition and fee calculation as prescribed by the Department of Education for full-time attendance at a public postsecondary education institution at the comparable level. Section 1009.538, F.S.

<sup>5</sup> Sections 1009.53(1) and 1009.531(2)(a)-(c), F.S. Starting with 2012-2013 graduates, a student graduating from high school is able to accept an initial award for 2 years following high school and to accept a renewal award for 5 years following high school graduation.

<sup>6</sup> Section 1009.53(2), F.S.

- Florida Academic Scholars (FAS);<sup>7</sup>
- Florida Medallion Scholars (FMS);<sup>8</sup> and
- Florida Gold Seal Vocational Scholars and Florida Gold Seal CAPE Scholars.<sup>9</sup>

Bright Futures program award amounts are specified annually in the General Appropriations Act (GAA).<sup>10</sup> The 2017-2018 GAA provides FAS awards equal to 100 percent of tuition and applicable fees, and an additional \$300 each fall and spring semester for textbooks and college-related expenses.<sup>11</sup> The applicable fees include the activity and service fee, health fee, athletic fee, financial aid fee, capital improvement fee, campus access/transportation fee, technology fee, and the tuition differential fee.<sup>12</sup> Accordingly, students attending a public postsecondary education institution have tuition and applicable fees covered.<sup>13</sup> Students attending a private postsecondary education institution receive a comparable amount.<sup>14, 15</sup>

A student may use a Bright Futures award for summer term enrollment if funds are available.<sup>16</sup> Funds have not been appropriated for Bright Futures summer term awards since the 2000-2001 fiscal year.<sup>17</sup> However, the 2017-2018 GAA provides funds for 2018 summer term FAS awards at an amount equal to 100 percent of tuition and applicable fees.<sup>18</sup>

#### *Effect of Proposed Changes*

The bill modifies the awards for the Bright Futures FAS and FMS programs.

#### Florida Bright Futures Scholarship Program – Florida Academic Scholars

The bill codifies the FAS award amount<sup>19</sup> to cover 100 percent of tuition and certain tuition-indexed fees<sup>20</sup> plus \$300 for textbooks and educational expenses during each fall and spring

<sup>7</sup> Section 1009.534, F.S.

<sup>8</sup> Section 1009.535, F.S.

<sup>9</sup> Section 1009.536, F.S.

<sup>10</sup> Sections 1009.534(2), 1009.535(2), and 1009.536(3), F.S.

<sup>11</sup> Specific Appropriation 4, 2017-70, L.O.F. The 2017-2018 GAA also provides FMS awards at \$77 at 4-year institutions, \$63 at 2-year institutions, \$53 for upper-division programs at Florida Colleges, and \$39 for career and technical centers. *Id.*

<sup>12</sup> Florida Department of Education, *2017-18 Bright Futures Scholarship Program Award Amounts Update*, July 12, 2017, available at <http://edr.state.fl.us/content/conferences/financialaid/DOEMemorandum.pdf>.

<sup>13</sup> Florida Department of Education, Office of Student Financial Assistance, *Bright Futures Student Handbook*, available at <http://www.floridastudentfinancialaid.org/SSFAD/PDF/BFHandbookChapter2.pdf>, at 4.

<sup>14</sup> *Id.*

<sup>15</sup> Section 1009.538, F.S.

<sup>16</sup> Section 1009.53(9), F.S.

<sup>17</sup> Florida Office of Economic and Demographic Research, Student Financial Aid Impact Conference (March 2015), available at <http://edr.state.fl.us/Content/conferences/financialaidimpact/archives/150303financialaidimpact.pdf>.

<sup>18</sup> Specific Appropriation 4, 2017-70, L.O.F.

<sup>19</sup> The 2017-2018 GAA provides that Florida Academic Scholars must receive an award equal to 100 percent of tuition and applicable fees, and an additional \$300 each fall and spring semester for textbooks and college-related expenses. Specific Appropriation 4, 2017-70, L.O.F.

<sup>20</sup> The tuition-indexed fees specified in SB 4 include financial aid, capital improvements, technology enhancements, equipping buildings, or the acquisition of improved real property, and technology

semester or the equivalent, beginning in the fall 2017-2018 academic year. The Legislature appropriated \$397.3 million in the 2017-2018 GAA for the Bright Futures Program, which includes \$274.1 million<sup>21</sup> to provide FAS awards at an amount equal to 100 percent of tuition and specified fees, including a \$300 per semester textbook stipend.<sup>22</sup>

Additionally, the bill authorizes the use of an FAS award for summer term enrollment, beginning in the 2018 summer term, as funded in the GAA. In the 2017-2018 GAA, \$39.5 million is appropriated for 2018 summer term FAS awards.

Increasing the FAS award and authorizing the use of the award for the summer term is likely to make postsecondary education in Florida more affordable and accessible for a projected 50,080<sup>23</sup> eligible students. As a result, the bill may help with retaining Florida’s talented students in the state.

Florida Bright Futures Scholarship Program – Florida Medallion Scholars

The bill increases the FMS award to an amount required to pay 75 percent of tuition and specified fees, beginning in the 2018 fall semester. Compared to 2017 FMS awards, the 75 percent award amount is projected to increase the per-credit-hour awards as shown in the table below:

	<b>2017-2018 FMS Per-Credit-Hour Award<sup>24</sup></b>	<b>Projected 2018-2019 FMS Per-Credit-Hour Award</b>
4-Year Institutions	\$77	\$159
2-Year Institutions	\$63	\$80
Upper Division in the FCS	\$53	\$92
Career/Technical Education	\$39	\$62

Accordingly, the expansion of the FMS program further facilitates higher education access and affordability for a projected 43,892<sup>25</sup> eligible students.

The bill also eliminates the prohibition in Florida law<sup>26</sup> regarding the inclusion of the following fees in Florida Bright Futures Scholarship Program awards:

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(s. 1009.22, F.S.); activity and service, financial aid, technology, capital improvements, technology enhancements, and equipping student buildings or the acquisition of improved real property (s. 1009.23, F.S.); financial aid, Capital Improvement Trust Fund, activity and service, health, athletic, technology, transportation access, and includes the tuition differential (s. 1009.24, F.S.). The bill specifies that only university-wide transportation access fees may be included in any Bright Futures award.

<sup>21</sup> Office of Economic & Demographic Research, *Florida Bright Futures Scholarship Program, Awards History and Forecast*, available at <http://edr.state.fl.us/Content/conferences/financialaid/ConferenceResults.pdf>, at 7.

<sup>22</sup> Specific Appropriation 4, 2017-70 L.O.F.

<sup>23</sup> Office of Economic & Demographic Research, *Florida Bright Futures Scholarship Program, Awards History and Forecast*, available at <http://edr.state.fl.us/Content/conferences/financialaid/ConferenceResults.pdf>, at 3.

<sup>24</sup> Specific Appropriation 4, 2017-70, L.O.F.

<sup>25</sup> Office of Economic & Demographic Research, *Florida Bright Futures Scholarship Program, Awards History and Forecast*, available at <http://edr.state.fl.us/Content/conferences/financialaid/ConferenceResults.pdf>, at 3.

<sup>26</sup> Sections 1009.22(7), 1009.23(10), and 1009.24(13), F.S.

- Technology fees at state universities and Florida College System institutions, and for postsecondary workforce education provided by school districts and Florida College System institutions.
- The tuition differential fee at a state university.

### ***Benacquisto Scholarship Program***

#### *Present Situation*

The Benacquisto Scholarship Program, created in 2014,<sup>27</sup> rewards any Florida high school graduate who receives recognition as a National Merit Scholar (NMS) or National Achievement Scholar (NAS) and who enrolls in a baccalaureate degree program at an eligible Florida public or independent postsecondary education institution.<sup>28</sup> Among other statutory eligibility requirements,<sup>29</sup> the student must earn a standard Florida high school diploma or equivalent<sup>30</sup> and be a state resident.<sup>31</sup>

The award amounts are as follows:

- At a Florida public postsecondary education institution the award is equal to the institutional cost of attendance less the sum of the student's Bright Futures Scholarship and NMS or NAS award.<sup>32,33</sup>
- At a Florida independent postsecondary education institution the award is equal to the highest cost of attendance at a Florida public university, as reported by the BOG, less the sum of the student's Bright Futures Scholarship and NMS or NAS award.<sup>34</sup>

#### *Effect of Proposed Changes*

The bill modifies eligibility requirements for the Benacquisto Scholarship Program to recruit talented and qualified students from out of state and assist out-of-state students to access higher education in Florida, graduate on time, and incur less education-related debt. Specifically, the bill:

- Establishes student eligibility criteria, to apply to students who are not residents of the state and who initially enroll in a baccalaureate degree program in the 2018-2019 academic year or thereafter, requiring such students to:

<sup>27</sup> The Benacquisto Scholarship Program was formerly titled the Florida National Merit Scholar Incentive Program. Section 26, ch. 2016-237, L.O.F.

<sup>28</sup> Section 1009.893, F.S.

<sup>29</sup> Section 1009.893(4), F.S.

<sup>30</sup> Other graduation options include Academically Challenging Curriculum to Enhance Learning (ACCEL) options (s. 1002.3105, F.S.), early high school graduation (s. 1003.4281, F.S.), a high school equivalency diploma (s.1003.435, F.S.), completion of a home education program (s. 1002.41, F.S.), or earning a high school diploma from a school outside Florida while living with a parent or guardian who is on military or public service assignment outside Florida.

<sup>31</sup> Section 1009.893(4)(a), F.S. Section 1009.40(1)(a)2., F.S., specifies that a student must meet the requirements of Florida residency for tuition purposes under s. 1009.21, F.S.; see also Rule 6A-10.044, F.A.C.

<sup>32</sup> The National Merit Scholarship Corporation discontinued the National Achievement Scholarship Program with the conclusion of the 2015 program, <http://www.nationalmerit.org/s/1758/interior.aspx?sid=1758&gid=2&pgid=433> (last visited Oct. 6, 2017).

<sup>33</sup> Section 1009.893(5)(a), F.S.

<sup>34</sup> *Id.* at (5)(b).

- Physically reside in Florida on or near the campus of the postsecondary education institution in which they enroll;
- Earn a high school diploma or equivalent or complete a home education program, comparable to Florida; and
- Be accepted by and enroll full-time in a baccalaureate degree program at an eligible regionally accredited public or private postsecondary education institution during the fall academic term following high school graduation.
- Provides that for an eligible student who is not a resident of the state and who attends:
  - A public postsecondary education institution, the award amount must be equal to the institutional cost of attendance<sup>35</sup> for a resident of the state less the student's National Merit Scholarship. The bill exempts such student from out-of-state fees.
  - A private postsecondary education institution, the award amount must be equal to the highest cost of attendance<sup>36</sup> for a resident of the state enrolled at a state university, less the student's National Merit Scholarship.

In the 2015-2016 and 2016-2017 academic years, an estimated average of 59<sup>37</sup> National Merit Scholars and National Achievement Scholars who initially enrolled in a Florida college or university graduated from out-of-state high schools. The modifications to student eligibility requirements may assist the state universities in recruiting and retaining talented and qualified students from other states.

### ***First Generation Matching Grant Program***

#### *Present Situation*

The First Generation Matching Grant Program (FGMG) was established in 2006<sup>38</sup> to enable each state university to provide donors with a matching grant incentive for contributions to create grant-based student financial aid for undergraduate students who demonstrate financial need and whose parents have not earned a baccalaureate degree.<sup>39</sup> Funds appropriated for the program must be allocated by the Office of Student Financial Assistance (within the Florida Department of Education) to match private contributions on a dollar-for-dollar basis.<sup>40</sup>

#### *Effect of Proposed Changes*

The bill expands need-based financial aid by revising the state to private match requirements from a 1:1 match to a 2:1 match, beginning in the 2018-2019 fiscal year.

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<sup>35</sup> The 2017-2018 cost of attendance on campus for full time undergraduate Florida resident students includes tuition and fees, books and supplies, room and board, transportation, and other expenses; the average annual cost of attendance for the State University System is \$21,790.31. Board of Governors, *Fall/Spring Cost of Attendance On-Campus for Full-Time Undergraduate Florida Residents 2017-2018*, available at [http://www.flbog.edu/board/office/budget/doc/attendance/CostAttendance2017\\_18\\_FINAL.xlsx](http://www.flbog.edu/board/office/budget/doc/attendance/CostAttendance2017_18_FINAL.xlsx).

<sup>36</sup> The highest State University System cost of attendance in 2017-2018 is \$23,960 at Florida Atlantic University. *Id.*

<sup>37</sup> Economic and Demographic Research, *Education Estimating Conference on Students Financial Aid Impact*, available at <http://edr.state.fl.us/Content/conferences/financialaidimpact/archives/170612financialaidimpact.pdf>, at 10.

<sup>38</sup> Section 1, ch. 2006-73, L.O.F.

<sup>39</sup> Section 1009.701(1), F.S.

<sup>40</sup> *Id.* at (2).



In the 2016-2017 fiscal year, 8,361 students received an initial or renewal average award of \$1,269.83.<sup>41</sup> Additionally, there were 15,442 students who were eligible for the FGMG award but who did not receive the award, as reported by public postsecondary education institutions.<sup>42</sup> The increase in the state matching contribution rate may raise the award amount and assist more eligible students to receive the award, which may help the students to graduate on time.

The bill also codifies the authority for Florida College System (FCS) institutions to raise funds to match the state appropriations for FGMG to provide need-based financial assistance to students attending FCS institutions, which has been specified in the GAA since 2007.

### ***Florida Farmworker Student Scholarship Program***

#### *Present Situation*

Student eligibility requirements for state financial aid awards and tuition assistance grants<sup>43</sup> typically include, but are not limited to, residency in this state for no less than one year preceding the award of aid or a tuition assistance grant for specific programs established in law.<sup>44</sup> Residency in this state must be for purposes other than to obtain an education.<sup>45</sup> The residency status for financial aid awards and tuition assistance must be determined in the same manner as resident status for tuition purposes.<sup>46</sup>

A dependent child who is a United States citizen may not be denied classification as a resident for tuition purposes based solely upon the immigration status of his or her parent.<sup>47</sup>

#### *Effect of Proposed Changes*

The bill creates the Florida Farmworker Scholarship Program (Farmworker Scholarship), to be administered by the Department of Education (DOE). Beginning in the 2017-2018 academic year, up to 50 scholarships must be awarded annually to farmworkers, as defined in s. 420.503, F.S.,<sup>48</sup> and the children of such farmworkers, who meet the scholarship eligibility criteria. To be eligible for an initial scholarship, a student must, at a minimum:

- Have resident status as required by s. 1009.40 F.S.,<sup>49</sup> and rules of the State Board of Education;

<sup>41</sup> Florida Department of Education, Office of Student Financial Assistance, *End-of-Year Report, 2016-17*, First Generation Matching Grant Program, available at

[https://www.floridastudentfinancialaidsg.org/pdf/EOY\\_Reports/2016-17/FGMG\\_2016\\_2017.pdf](https://www.floridastudentfinancialaidsg.org/pdf/EOY_Reports/2016-17/FGMG_2016_2017.pdf).

<sup>42</sup> *Id.*

<sup>43</sup> See section 1009.40, F.S.

<sup>44</sup> *Id.* at (1)(a)2., F.S. The residency requirement applies to programs under ss. 1009.50, 1009.505, 1009.51, 1009.52, 1009.53, 1009.60, 1009.62, 1009.72, 1009.73, 1009.77, 1009.89, and 1009.89, F.S.

<sup>45</sup> *Id.*

<sup>46</sup> *Id.*

<sup>47</sup> Section 1009.21(2)(d), F.S.

<sup>48</sup> A “Farmworker” is a laborer who is employed on a seasonal, temporary, or permanent basis in the planting, cultivating, harvesting, or processing of agricultural or aquacultural products and who derived at least 50 percent of her or his income in the immediately preceding 12 months from such employment.

Section 420.503(18)(a), F.S.

<sup>49</sup> Students must meet the requirement related to residency in this state for no less than 1 year preceding the award. Residency must be for purposes other than to obtain an education and the student’s resident status must be

- Earn a minimum cumulative 3.5 weighted grade point average (GPA) for all high school courses creditable towards a diploma;
- Complete a minimum of 30 hours of community service; and
- Have at least a 90 percent attendance rate and not have had any disciplinary action brought against him or her, as documented on the student's high school transcript.

Undocumented immigrants are not eligible for a Farmworker Scholarship award. A Farmworker Scholarship recipient, who is enrolled full-time, is eligible for an award equal to 100 percent of tuition and specified fees at a public postsecondary education institution. A scholarship recipient must maintain at least a cumulative 2.5 college GPA to renew the award, and may receive funding for a maximum of 100 percent of the number of credit hours required to complete an associate or baccalaureate degree program. The bill specifies that funding for the Farmworker Scholarship is contingent upon an appropriation in the GAA.<sup>50</sup>

### ***William L. Boyd, IV, Florida Resident Access Grant***

#### *Present Situation*

The William L. Boyd, IV, Florida Resident Access Grant (FRAG) is a tuition assistance program that is available to full-time degree-seeking undergraduate students registered at an independent nonprofit college or university which is located in and chartered by the state; which is accredited by the Commission on Colleges of the Southern Association of Colleges and Schools; which grants baccalaureate degrees; which is not a state university or FCS institution; and which has a secular purpose.<sup>51</sup>

#### *Effect of Proposed Changes*

The bill renames the FRAG Program as the William L. Boyd, IV, Effective Access to Student Education (EASE) Grant Program.

### ***Stanley G. Tate Florida Prepaid College Program***

#### *Present Situation*

The Florida Prepaid College Program (Prepaid Program) provides families an affordable and secure way to save for tuition and specified fees at Florida's postsecondary institutions.<sup>52</sup> The Prepaid Program allows a family to pay for tuition and specified fees in advance of enrollment in a state postsecondary institution at a rate lower than the projected corresponding cost at the time of actual enrollment.<sup>53</sup> These payments are invested in a manner that yields sufficient interest to generate the difference between the prepaid amount and the cost of tuition and specified fees at

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determined in the same manner as the resident status for tuition purposes pursuant to s. 1009.21, F.S. Section 1009.40(1)(a)2., F.S.

<sup>50</sup> The 2017-2018 GAA appropriated \$500,000 to the Florida Farmworker Scholarship Program.

<sup>51</sup> Section 1009.89(1) and (3), F.S.

<sup>52</sup> Florida Prepaid College Board, *2016 Annual Report*, available at [http://www.myfloridaprepaid.com/wp-content/uploads/fpcb\\_2016\\_annual\\_report.pdf](http://www.myfloridaprepaid.com/wp-content/uploads/fpcb_2016_annual_report.pdf), at 6.

<sup>53</sup> Section 1009.98, F.S.

the time of actual enrollment. For the fall 2015 semester, 59,019 students used a Florida Prepaid College Plan at a state university.<sup>54</sup>

*Effect of Proposed Changes*

The bill specifies that a Florida Prepaid College Program plan (Prepaid Plan), purchased prior to July 1, 2024, is only obligated to pay for the credit hours in which a student is enrolled. In effect, this provision protects a student under any potential block tuition policy by limiting the Prepaid Plan obligation to actual hours in which the student enrolls, even if the student enrolls in fewer credit hours than the rate at which the block tuition is set.

***Block Tuition***

*Present Situation*

The BOG is authorized to approve a proposal from a university board of trustees to implement flexible tuition<sup>55</sup> policies including, but not limited to, block tuition.<sup>56</sup> The block tuition policy for resident undergraduate students or undergraduate-level courses must be based on the established per-credit-hour undergraduate tuition.<sup>57</sup> The block tuition policy for nonresident undergraduate students must be based on the established per-credit-hour undergraduate tuition and out-of-state fee.<sup>58</sup> The BOG has not received a block tuition policy proposal for approval from any state university.<sup>59</sup>

*Effect of Proposed Changes*

The bill requires each state university boards of trustees (BOT) to adopt, for implementation beginning in the fall 2018 academic semester, a block tuition policy for the entering freshman class of full-time, FTIC students. Such policy may provide students with a financial incentive to enroll in additional courses and graduate in 4 years with a baccalaureate degree. Each block tuition policy must, at a minimum:

- Include block tuition and any required fees;
- Require the university to maximize the application of appropriate acceleration credits; and
- Enable students to have the flexibility to earn at least 30 credits in any combination of fall, spring, and summer academic semesters or terms.

The bill modifies the public notification requirements in Florida law<sup>60</sup> related to tuition and fee increases at state universities to apply to any change in tuition and fees.

Additionally, the bill requires each state university BOT to submit to the BOG its block tuition policy by April 1, 2018, along with information on the potential impact of such policy on

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<sup>54</sup> Florida Prepaid College Board, *2016 Annual Report*, available at [http://www.myfloridaprepaid.com/wp-content/uploads/fpcb\\_2016\\_annual\\_report.pdf](http://www.myfloridaprepaid.com/wp-content/uploads/fpcb_2016_annual_report.pdf), at 11.

<sup>55</sup> Section 1009.01, F.S., defines tuition as the basic fee charged to a student for instruction provided by a public postsecondary education institution in this state.

<sup>56</sup> Section 1009.24(15)(a), F.S.

<sup>57</sup> *Id.* at 3.

<sup>58</sup> *Id.*

<sup>59</sup> Board of Governors, *2018 Bill Analysis for SB 4* (Sept. 22, 2017), at 6.

<sup>60</sup> Section 1009.24(20), F.S.

students. By August 1, 2018, the Chancellor of the State University System must submit to the Governor and the Legislature a summary of the block tuition policies, the status of the BOG's review and approval of such policies, and the BOG's recommendations for improving block tuition and fee benefits for students.

Institutions in other states that have implemented a block tuition policy include, but are not limited to, the University of Michigan, the Ohio State University and the University of North Carolina at Chapel Hill.<sup>61</sup> Additionally, the University of Oklahoma<sup>62</sup> and Oklahoma State University<sup>63</sup> have implemented block tuition policies that incentivize students to complete 15 credits in each of the fall and spring semesters, or 30 credits in the fall, spring, and summer semesters.

### **Institution Excellence**

The ability of the state universities to recruit talented faculty and researchers, make strategic investments in research infrastructure, and connect university research to economic development, is key to advancing Florida's research and innovation competitiveness and effectiveness.<sup>64</sup>

#### *Present Situation*

According to the BOG, for Florida to "secure its place as a national leader in the 21<sup>st</sup> century, it must prove competitive in discovery and innovation."<sup>65</sup> The stronger the universities and the State of Florida are in research and development (R&D) performance and reputation, the more competitive Florida becomes in attracting and retaining the best and most promising faculty, students, staff, and companies.<sup>66</sup>

In a 2014-15 National Science Foundation survey of R&D spending across the United States, the State of Florida ranked 4<sup>th</sup> on total research and development expenditures among public universities, behind California, Texas, and Michigan.<sup>67</sup> States with strong and competitive research enterprises support the research infrastructure in their state with a wide range of

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<sup>61</sup> Presentation to the Committee on Education, The Florida Senate (Dec. 12, 2016), Office of Program Policy and Government Accountability, *State University System Undergraduate Student Success Overview*, available at [http://www.flsenate.gov/PublishedContent/Committees/2016-2018/ED/MeetingRecords/MeetingPacket\\_3540.pdf](http://www.flsenate.gov/PublishedContent/Committees/2016-2018/ED/MeetingRecords/MeetingPacket_3540.pdf), at 33.

<sup>62</sup> University of Oklahoma, *Flat-Rate Tuition*, <http://www.ou.edu/bursar/flat-rate-tuition.html> (last visited Oct. 6, 2017).

<sup>63</sup> Oklahoma State University, *Block Rate Information*, <http://blockrate.okstate.edu/faq> (last visited Oct. 6, 2017).

<sup>64</sup> Board of Governors, *Draft of Advancing Research and Innovation Legislative Budget Request*, Presentation to the Board of Governors Task Force on University Research (Sept. 22, 2016), available at [http://www.flbog.edu/documents\\_meetings/0201\\_1017\\_7616\\_10.3.2%20TF-RSRCH%2003b%20LBR%Request%20VPRs%20\\_2017\\_18%201aug2016%20Form%201%20\(002\)\\_JMI.pdf](http://www.flbog.edu/documents_meetings/0201_1017_7616_10.3.2%20TF-RSRCH%2003b%20LBR%Request%20VPRs%20_2017_18%201aug2016%20Form%201%20(002)_JMI.pdf).

<sup>65</sup> Board of Governors, *Draft of Advancing Research and Innovation Legislative Budget Request*, Presentation to the Board of Governors Task Force on University Research (Sept. 22, 2016), available at [http://www.flbog.edu/documents\\_meetings/0201\\_1017\\_7616\\_10.3.2%20TF-RSRCH%2003b%20LBR%Request%20VPRs%20\\_2017\\_18%201aug2016%20Form%201%20\(002\)\\_JMI.pdf](http://www.flbog.edu/documents_meetings/0201_1017_7616_10.3.2%20TF-RSRCH%2003b%20LBR%Request%20VPRs%20_2017_18%201aug2016%20Form%201%20(002)_JMI.pdf).

<sup>66</sup> *Id.*

<sup>67</sup> Email. Board of Governors (Jan. 12, 2017).

statewide grant programs to make their state universities more competitive for federal grant opportunities.<sup>68</sup>

In Florida, the state universities have identified the need for funding to support university efforts to:<sup>69</sup>

- Increase research capacity, output, and impact through targeted cluster hiring of talented faculty and strategic investments in research infrastructure.
- Increase and enhance undergraduate student participation in research through undergraduate research programs.
- Connect university research to Florida's industry and economic development through industry-sponsored research at state universities and research commercialization activities.

### *Effect of Proposed Changes*

The bill establishes the World Class Faculty and Scholar Program and the State University Professional and Graduate Degree Excellence Program to advance the national competitiveness of the state universities in Florida.

### World Class Faculty and Scholar Program

The bill establishes the World Class Faculty and Scholar Program to elevate the national prominence of state universities in Florida. Specifically, this section:

- Authorizes state university investments in recruiting and retaining talented faculty; and specifies that funding for the program will be as provided in the GAA, beginning in the 2017-2018 fiscal year.
- Specifies that such investments may include, but not be limited to, investments in research-centric cluster hires, faculty research and research commercialization efforts, instructional and research infrastructure, undergraduate student participation in research, professional development, awards for outstanding performance, and postdoctoral fellowships.
- Requires the BOG to, annually, by March 15, provide to the Governor, President of the Senate, and Speaker of the House of Representatives, an accountability report which includes specific expenditure information on program funds and the impact of those expenditures in elevating the national competitiveness of the universities, specifically relating to the:
  - Success in recruiting research faculty and the resulting research funding;
  - 4-year graduation rate;
  - Number of undergraduate courses offered with fewer than 50 students; and
  - Increased national academic standing of targeted programs.

The bill creates a funding mechanism to assist the state universities with faculty recruitment and retention efforts to attract exemplary faculty and research scholars to Florida, which may ultimately help Florida's state universities improve their national competitiveness. According to the BOG, the "single most significant asset that the state has that will determine Florida's future

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<sup>68</sup> Board of Governors, *Draft of Advancing Research and Innovation Legislative Budget Request*, Presentation to the Board of Governors Task Force on University Research (Sept. 22, 2016), available at [http://www.flbog.edu/documents\\_meetings/0201\\_1017\\_7616\\_10.3.2%20TF-RSRCH%2003b%20LBR%20Request%20VPRs%20\\_2017\\_18%201aug2016%20Form%201%20\(002\)\\_JMI.pdf](http://www.flbog.edu/documents_meetings/0201_1017_7616_10.3.2%20TF-RSRCH%2003b%20LBR%20Request%20VPRs%20_2017_18%201aug2016%20Form%201%20(002)_JMI.pdf).

<sup>69</sup> *Id.*

status in the industries of the future are its universities and their capacity to generate new ideas and innovations through research.”<sup>70</sup>

#### State University Professional and Graduate Degree Excellence Program

The bill establishes the State University Professional and Graduate Degree Excellence Program (Degree Excellence Program) to fund and support the efforts of state universities to enhance the quality and excellence of professional schools and graduate degree programs in medicine, law, and business, and expand the economic impact of state universities. Specifically, the bill:

- Authorizes quality improvement efforts of the state universities, and specifies that funding for the program will be as provided in the GAA, beginning in the 2017-2018 fiscal year.
- Specifies that such efforts may include, but not be limited to, targeted investments in faculty, students, research, infrastructure, and other strategic endeavors to elevate the national and global prominence of state university medicine, law, and graduate-level business degree programs.
- Requires the BOG to, annually, by March 15, provide to the Governor, President of the Senate, and Speaker of the House of Representatives, an accountability report which includes specific expenditure information on program funds and the impact of those expenditures in elevating the national and global prominence of the university medicine, law, and graduate-level business programs, specifically relating to the:
  - First-time pass rate on the United States Medical Licensing Examination;
  - First-time pass rate on the Florida Bar Examination;
  - Percentage of graduates enrolled or employed at a wage threshold that reflects the added value of a graduate-level business degree;
  - Advancement in rankings of the state university medicine, law, and graduate-level business degree programs; and
  - Added economic benefit of the universities to the state.

The Degree Excellence Program creates a funding mechanism to boost the excellence of state university professional schools and graduate degree programs in specified areas. The Degree Excellence Program may bolster the state universities’ efforts to recruit and retain talented students and faculty, which may help to raise the national and international prominence of the state universities and the programs within such universities. The Degree Excellence Program may also assist in improving the national rankings of the state universities in medicine, law, and business. The table below lists the 2018 U.S. News and World Report rankings<sup>71</sup> for such programs.

<sup>70</sup> Board of Governors, *Draft of Advancing Research and Innovation Legislative Budget Request*, Presentation to the Board of Governors Task Force on University Research (Sept. 22, 2016), available at [http://www.flbog.edu/documents\\_meetings/0201\\_1017\\_7616\\_10.3.2%20TF-RSRCH%2003b%20LBR%20Request%20VPRs%20\\_2017\\_18%201aug2016%20Form%201%20\(002\)\\_JMI.pdf](http://www.flbog.edu/documents_meetings/0201_1017_7616_10.3.2%20TF-RSRCH%2003b%20LBR%20Request%20VPRs%20_2017_18%201aug2016%20Form%201%20(002)_JMI.pdf).

<sup>71</sup>The Florida Senate staff analysis of U.S. News & World Report, *Graduate School Rankings*, <https://www.usnews.com/best-graduate-schools> (last visited Oct. 6, 2017).



Institution	Medicine (Research) <sup>72</sup>	Medicine (Primary Care) <sup>73</sup>	Law <sup>74</sup>	Business <sup>75</sup>
Florida Atlantic University	Unranked <sup>76</sup>	Unranked		Unranked
Florida A&M University			RNP <sup>77</sup>	Unranked
Florida Gulf Coast University				Unranked
Florida International University	Unranked	Unranked	100	Unranked
Florida State University	RNP	RNP	48	Unranked
University of Central Florida	RNP	RNP		Unranked
University of Florida	40	61	41	40
University of North Florida				Unranked
University of South Florida	56	77		Unranked
University of West Florida				Unranked

**Institution Accountability**

Under the leadership of the Legislature and the BOG, the state universities in Florida continue to maintain focus on improving student performance and outcomes by strengthening institutional accountability.

The BOG has established the following accountability mechanisms to maintain a consistent focus on state university excellence:<sup>78</sup>

- The annual *System Accountability Report*<sup>79</sup> tracks performance trends on key metrics over five years.

<sup>72</sup> The Florida Senate staff analysis of U.S. News & World Report, *Medical Schools (Research)*, <https://www.usnews.com/best-graduate-schools/top-medical-schools/research-rankings?int=af3309&int=b3b50a&int=b14409> (last visited Oct. 6, 2017).

<sup>73</sup> The Florida Senate staff analysis of U.S. News & World Report, *Medical Schools (Primary Care)*, <https://www.usnews.com/best-graduate-schools/top-medical-schools/primary-care-rankings?int=af3309&int=b3b50a&int=aac509> (last visited Oct. 6, 2017).

<sup>74</sup> The Florida Senate staff analysis of U.S. News & World Report, *Law Schools*, <https://www.usnews.com/best-graduate-schools/top-law-schools/law-rankings?int=a1d108> (last visited Oct. 6, 2017).

<sup>75</sup> The Florida Senate staff analysis of U.S. News & World Report, *Business Schools*, <https://www.usnews.com/best-graduate-schools/top-business-schools/mba-rankings?int=9dc208> (last visited Oct. 6, 2017).

<sup>76</sup> “Unranked” indicates a school or program attribute does not align with U.S. News & World Report ranking metrics.

<sup>77</sup> “RNP” indicates a ranking not published, which indicates the program is in the bottom 25 percent of the U.S. News & World Report rankings.

<sup>78</sup> Board of Governors, *Focus on Excellence: Board of Governors’ State University System Initiatives*, Presentation to the Committee on Education, The Florida Senate (Dec. 12, 2016), available at [http://www.flSenate.gov/PublishedContent/Committees/2016-2018/ED/MeetingRecords/MeetingPacket\\_3540.pdf](http://www.flSenate.gov/PublishedContent/Committees/2016-2018/ED/MeetingRecords/MeetingPacket_3540.pdf).

<sup>79</sup> Board of Governors, *2015-16 System Accountability Report*, available at [http://www.flbog.edu/board/doc/accountability/ar\\_2015-16/2015\\_16\\_System\\_Accountability\\_Report\\_Summary\\_FINAL\\_2017-03-30.pdf](http://www.flbog.edu/board/doc/accountability/ar_2015-16/2015_16_System_Accountability_Report_Summary_FINAL_2017-03-30.pdf).

- The *2025 System Strategic Plan*<sup>80</sup> provides a long-range roadmap for the SUS.
- The *University Work Plans*<sup>81</sup> provide a three-year plan of action.

Additionally, the Legislature has established performance-based funding models in recent years to evaluate the performance of Florida's state universities based on identified metrics and standards.

The bill strengthens institutional accountability by modifying state university performance and accountability metrics and standards to promote on-time student graduation in 4 years with a baccalaureate degree.

### ***State University System Performance-Based Incentive***

#### *Present Situation*

The SUS Performance-Based Incentive is awarded to state universities using performance-based metrics<sup>82</sup> adopted by the BOG.<sup>83</sup> The metrics include, but are not limited to, bachelor's degree graduates' employment and wages, average cost per bachelor's degree, a 6-year graduation rate, academic progress rates, access for students with a Pell grant,<sup>84</sup> and bachelor's and graduate degrees in areas of strategic emphasis.

The BOG is required to adopt benchmarks to evaluate each state university's performance on the metrics.<sup>85</sup> The evaluation assists with measuring a state university's achievement of institutional excellence or need for improvement, which determines the university's eligibility to receive performance funding.<sup>86</sup>

#### *Effect of Proposed Changes*

The bill specifies that, beginning with the BOG's determination of each university's performance improvement and achievement rating for 2018 and related distribution of the 2018-2019 fiscal year appropriation, the SUS performance-based metric for graduation rate must be a 4-year graduation rate.

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<sup>80</sup> Board of Governors, *2025 System Strategic Plan*, available at

[http://www.flbog.edu/board/doc/strategicplan/2025\\_System\\_Strategic\\_Plan\\_Amended\\_FINAL.pdf](http://www.flbog.edu/board/doc/strategicplan/2025_System_Strategic_Plan_Amended_FINAL.pdf).

<sup>81</sup> Board of Governors, *2017 Work Plan Reports*, [http://www.flbog.edu/board/workplan/2017\\_workplan.php](http://www.flbog.edu/board/workplan/2017_workplan.php) (last visited Oct. 6, 2017).

<sup>82</sup> Board of Governors, *Performance Funding Model Overview*, available at

[http://www.flbog.edu/board/office/budget/doc/performance\\_funding/Overview-Doc-Performance-Funding-10-Metric-Model-Condensed-Version.pdf](http://www.flbog.edu/board/office/budget/doc/performance_funding/Overview-Doc-Performance-Funding-10-Metric-Model-Condensed-Version.pdf).

<sup>83</sup> Section 1001.92(1), F.S.

<sup>84</sup> Board of Governors, *Performance Funding Model Overview*, available at

[http://www.flbog.edu/board/office/budget/doc/performance\\_funding/Overview-Doc-Performance-Funding-10-Metric-Model-Condensed-Version.pdf](http://www.flbog.edu/board/office/budget/doc/performance_funding/Overview-Doc-Performance-Funding-10-Metric-Model-Condensed-Version.pdf).

<sup>85</sup> Section 1001.92(1), F.S.

<sup>86</sup> *Id.*



Currently, the 6-year and 4-year graduation rates for first-time-in-college (FTIC) students within the SUS are approximately 70 percent<sup>87</sup> and 47 percent,<sup>88</sup> respectively. During the 2015-2016 academic year, the 6-year graduation rate for such students ranged from approximately 87 percent at the University of Florida (UF) to 41 percent at Florida Agricultural and Mechanical University (FAMU).<sup>89</sup> The 4-year graduation rate during the same period ranged from approximately 67 percent at UF to 18 percent at FAMU.<sup>90</sup>

In comparison, the 4-year graduation rate for selected universities in other states during the same period was 86 percent at the University of Virginia; 81 percent at the University of North Carolina-Chapel Hill; 76 percent at the University of Michigan, Ann Arbor; 72 percent at the University of California, Berkeley; and 51 percent at the University of Texas at Austin.<sup>91</sup>

The shift in focus from 6-year to 4-year graduation rate will likely prompt a modification to the SUS strategic plan, as well as state university accountability mechanisms, which may assist with elevating the prominence and national competitiveness of the state universities in Florida.

Graduation rates are one of the key accountability measures that demonstrate how well an institution is serving its FTIC students.<sup>92</sup> On-time graduation in 4 years with a baccalaureate degree may result in savings related to cost of attendance for students and their families. For example, nationally, every extra year beyond 4 years to graduate with a baccalaureate degree from a public 4-year college costs a student \$22,826.<sup>93</sup> This may also result in lost wages owing to delayed entrance into the workforce. The median wage of 2013-2014 baccalaureate degree graduates employed full-time one year after graduation was \$38,000.<sup>94</sup>

Additionally, the bill specifies that the performance-based metric related to access must include benchmarks that reward institutions with access rates at or above 50 percent. In fall 2015, the access rate for the SUS was 39 percent. FAMU (at 65.4 percent) and Florida International University (at 51.4 percent) exceeded the specified access rate.<sup>95</sup>

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<sup>87</sup> State University System of Florida, *2015-16 System Accountability Report*, available at [http://www.flbog.edu/board/doc/accountability/ar\\_2015-16/2015\\_16\\_System\\_Accountability\\_Report\\_Summary\\_FINAL\\_2017-03-30.pdf](http://www.flbog.edu/board/doc/accountability/ar_2015-16/2015_16_System_Accountability_Report_Summary_FINAL_2017-03-30.pdf), at 7.

<sup>88</sup> *Id.* at 15.

<sup>89</sup> *Id.* at 7.

<sup>90</sup> *Id.* at 15.

<sup>91</sup> Integrated Postsecondary Education Database, <https://nces.ed.gov/ipeds/datacenter/InstitutionByName.aspx> (last visited Oct. 6, 2017).

<sup>92</sup> Board of Governors, *2025 System Strategic Plan*, March 2016, at 26, available at [http://www.flbog.edu/board/doc/strategicplan/2025\\_System\\_Strategic\\_Plan\\_Amended\\_FINAL.pdf](http://www.flbog.edu/board/doc/strategicplan/2025_System_Strategic_Plan_Amended_FINAL.pdf).

<sup>93</sup> Complete College America, *Four-Year Myth: Make College More Affordable. Restore the Promise of Graduating on Time* (2014), available at <http://completecollege.org/wp-content/uploads/2014/11/4-Year-Myth.pdf>, at 5.

<sup>94</sup> State University System of Florida, *2015-16 System Accountability Report*, available at [http://www.flbog.edu/board/doc/accountability/ar\\_2015-16/2015\\_16\\_System\\_Accountability\\_Report\\_Summary\\_FINAL\\_2017-03-30.pdf](http://www.flbog.edu/board/doc/accountability/ar_2015-16/2015_16_System_Accountability_Report_Summary_FINAL_2017-03-30.pdf), at 7.

<sup>95</sup> *Id.* at 8.

## ***Preeminent State Research Universities Program***

### *Present Situation*

The Preeminent State Research Universities Program is a collaborative partnership between the BOG and the Legislature to raise the academic and research preeminence of the highest performing state research universities in Florida.<sup>96</sup> A state university that meets 11 of the 12 academic and research excellent standards specified in law<sup>97</sup> is designated a “preeminent state research university.”<sup>98</sup> Currently, the University of Florida and the Florida State University are designated as preeminent state research universities.<sup>99</sup>

A state research university that meets at least 6 of the 12 standards is designated as an “emerging preeminent state research university.”<sup>100</sup> Currently, the University of Central Florida and the University of South Florida-Tampa are designated as emerging preeminent state research universities.<sup>101</sup> Each designated emerging preeminent state research university receives an amount of funding that is equal to one-half of the total increased amount awarded to each designated preeminent state research university.<sup>102</sup>

### Courses Unique to the Institution

A university that is designated a preeminent state research university may require its incoming FTIC students to take a six-credit set of unique courses.<sup>103</sup> The university may stipulate that credit for such courses may not be earned through any acceleration mechanism<sup>104</sup> or any other transfer credit specifically determined by the university.<sup>105</sup>

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<sup>96</sup> Section 1001.7065(1), F.S.

<sup>97</sup> Section 1001.7065(2), F.S. The standards include: incoming freshman academic characteristics (average weighted GPA and average SAT score); institutional ranking nationally; freshman retention rate; 6-year graduation rate; national academy membership of institution faculty; research expenditures and patents awarded annually; doctoral degrees awarded annually; postdoctoral appointees annually; and institutional endowment.

<sup>98</sup> Section 1001.7065(3)(a), F.S.

<sup>99</sup> Board of Governors, State University System of Florida, *2017 System Summary of University Work Plans*, at 10, available at

[http://www.flbog.edu/board/doc/workplan/workplan\\_2017/2017\\_SYSTEM\\_WORK\\_PLAN\\_FINAL\\_2017-06-15.pdf](http://www.flbog.edu/board/doc/workplan/workplan_2017/2017_SYSTEM_WORK_PLAN_FINAL_2017-06-15.pdf).

<sup>100</sup> Section 1001.7065(3)(b), F.S.

<sup>101</sup> Board of Governors, State University System of Florida, *2017 System Summary of University Work Plans 2016*, available at

[http://www.flbog.edu/board/doc/workplan/workplan\\_2017/2017\\_SYSTEM\\_WORK\\_PLAN\\_FINAL\\_2017-06-15.pdf](http://www.flbog.edu/board/doc/workplan/workplan_2017/2017_SYSTEM_WORK_PLAN_FINAL_2017-06-15.pdf), at 10.

<sup>102</sup> Section 1001.7065(5)(c)2., F.S. The 2017-2018 GAA appropriated \$52,000,000 to fund the preeminent and emerging preeminent state research universities. Specific Appropriation 141, 2017-70, L.O.F.

<sup>103</sup> Section 1001.7065(6), F.S.

<sup>104</sup> Acceleration mechanisms include Advanced Placement (AP), International Baccalaureate (IB), Advanced International Certificate of Education (AICE), credit by examination, and dual enrollment.

Section 1007.27(1), F.S.

<sup>105</sup> Section 1001.7065(6), F.S.

### Programs of National Excellence

The BOG is encouraged to establish standards and measures to identify individual programs in state universities that objectively reflect national excellence and make recommendations to the Legislature about ways to enhance and promote such programs.<sup>106</sup>

### *Effect of Proposed Changes*

Consistent with the emphasis on a 4-year graduation rate metric for the SUS Performance-Based Incentive program, the bill revises the full-time FTIC student graduation rate metric for the preeminent state research university program from a 6-year to a 4-year rate,<sup>107</sup> and modifies the benchmark for the graduation rate metric from 70 percent to 60 percent. However, for the 2018 determination of a university's preeminent designation and distribution of 2018-2019 fiscal year appropriation, the bill specifies that a university that attains a 6-year graduation rate of 70 percent by October 1, 2017, is considered to have satisfied the graduation rate measure. The bill requires the BOG to confirm such 6-year graduation rate reported by each state university to the Integrated Postsecondary Education Data System (IPEDS).<sup>108</sup>

The bill also revises the amount of funding provided to emerging preeminent state research universities from one-half to one-quarter of the total additional funding awarded to preeminent state research universities, beginning in the 2018-2019 fiscal year.

### Courses Unique to the Institution

The bill eliminates the authority for the preeminent state research universities to require FTIC students to take a 6-credit set of courses unique to the institution. Currently, UF lists two such courses and Florida State University lists 136 such courses.<sup>109</sup> Students are not able to apply acceleration mechanism or transfer credits toward the unique course requirements.<sup>110</sup> By deleting the authority for unique courses, the bill may provide to students flexibility in applying earned college credits purposefully toward degree requirements, which may assist the students to graduate on time in 4 years with a baccalaureate degree.

### Programs of National Excellence

Consistent with efforts to strengthen institutional accountability to elevate the prominence of state universities, the bill changes from an encouragement to a requirement that the BOG establish standards and measures for programs of excellence throughout the SUS and specifies that the programs include undergraduate, graduate, and professional degrees. Additionally, the

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<sup>106</sup> Section 1001.7065(8), F.S.

<sup>107</sup> The bill also modifies the criterion for an increase in the tuition differential at a preeminent state research university from a 6-year to a 4-year graduation rate.

<sup>108</sup> IPEDS is a system of surveys conducted annually by the National Center for Education Statistics, which is a part of the Institute for Education Sciences within the United States Department of Education. National Center for Education Statistics, *IPEDS*, <https://nces.ed.gov/ipeds/> (last visited Oct. 6, 2017). Participation in the IPEDS surveys is mandatory for all institutions that participate in federal financial aid programs. 20 USC 1094, Section 487(a)(17) and 34 CFR 668.14(b)(19).

<sup>109</sup> The Florida Senate staff analysis of the Florida Statewide Course Numbering System (Oct. 6, 2017), at <http://scns.fldoe.org>.

<sup>110</sup> Section 1001.7065(6), F.S.

bill requires the BOG to make recommendations to the Legislature, by September 1, 2018, to enhance and promote such programs.

### ***Experiential Learning Opportunities***

#### *Present Situation*

The BOG is required to develop a strategic plan specifying goals and objectives for the State University System and each constituent university, including each university's contribution to overall system goals and objectives.<sup>111</sup>

The strategic plan must include criteria for designating baccalaureate and master's degree programs at specified universities as high-demand programs of emphasis.<sup>112</sup> Fifty percent of the criteria for designation as high-demand programs of emphasis must be based on achievement of performance outcome thresholds determined by the BOG, and 50 percent of the criteria must be based on achievement of performance outcome thresholds specifically linked to:<sup>113</sup>

- Job placement in employment of 36 hours or more per week and average full-time wages of graduates of the degree programs 1 year and 5 years after graduation.
- Data-driven gap analyses, conducted by the BOG, of the state's job market demands and the outlook for jobs that require a baccalaureate or higher degree.

In 2012, in response to a call from the chair of the BOG, the Commission on Higher Education Access and Educational Attainment (Commission) examined the alignment between higher education and workforce, which resulted in a method for a gap analysis of baccalaureate-level workforce demand.<sup>114</sup> In 2013, the BOG received \$15 million in appropriated funds to provide competitive awards to address high demand program areas identified in the Commission's gap analysis.<sup>115</sup> The gap analysis identified computer information and technology, and accounting and finance as high demand programs, requiring at least a bachelor's degree, with more than 1,000 unfilled annual openings in Florida.<sup>116</sup> In March 2014, the BOG approved four partnerships between universities and Florida College System institutions to receive \$15 million in funding for the Targeted Educational Attainment Grant Program, also known as the TEAm Grant Initiative.<sup>117</sup>

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<sup>111</sup> Section 1001.706(5)(b), F.S.

<sup>112</sup> Section 1001.706(5)(b)4., F.S.

<sup>113</sup> *Id.*

<sup>114</sup> Board of Governors, *Aligning Workforce and Higher Education for Florida's Future* (Nov. 21, 2013), available at <http://www.flbog.edu/board/advisorygroups/doc/commission-materials/Access-and-Educational-Attainment-Commission-Outline.docx>.

<sup>115</sup> Board of Governors, *TEAm Grant Initiative Update* (Sept. 21, 2016), available at [http://www.flbog.edu/documents\\_meetings/0201\\_1005\\_7558\\_2.10.1%20ASA%2010a\\_TEA%20Grant%20Initiative%20Update%20ai\\_JMI.pdf](http://www.flbog.edu/documents_meetings/0201_1005_7558_2.10.1%20ASA%2010a_TEA%20Grant%20Initiative%20Update%20ai_JMI.pdf).

<sup>116</sup> Board of Governors, *Aligning Workforce and Higher Education for Florida's Future* (Nov. 21, 2013), available at [http://www.flbog.edu/about/doc/commission-materials/Access-and-Attainment-Comm-FINAL-REPORT-10\\_29\\_13\\_rev.docx](http://www.flbog.edu/about/doc/commission-materials/Access-and-Attainment-Comm-FINAL-REPORT-10_29_13_rev.docx).

<sup>117</sup> *Id.*

*Effect of Proposed Changes*

The bill modifies the requirements of the strategic plan, developed by the BOG, to require state universities to use data-driven gap analyses to identify internship opportunities in high-demand fields for students.

Modifications to BOG's strategic plan emphasizes the value of internships in experiential learning.<sup>118</sup> Through internships, students are likely to gain exposure to relevant on-the-job experience and develop skills critical to securing and maintaining gainful employment in high-demand fields of unmet need.

*Developmental Education**Present Situation*

Developmental education is instruction through which a high school graduate who applies for any college credit program may attain the communication and computation skills necessary to successfully complete college credit instruction.<sup>119</sup> Developmental education may be delivered through a variety of strategies, described in law.<sup>120</sup>

Each FCS institution board of trustees is required to develop a plan to implement the developmental education strategies defined in law<sup>121</sup> and rules<sup>122</sup> of the SBE.<sup>123</sup> A state university BOT may contract with a FCS institution to provide developmental education services for university students in need of developmental education.<sup>124</sup> Currently, Florida Agricultural and Mechanical University (FAMU) is authorized to offer developmental education.<sup>125</sup>

*Effect of Proposed Changes*

The bill strengthens developmental education instruction by emphasizing the focus on instructional strategies specified in law<sup>126</sup> in the delivery of developmental education instruction by a state university. Currently, FAMU is the only state university within the SUS that provides developmental education.<sup>127</sup> In accordance with the bill modifications, FAMU may need to

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<sup>118</sup> Governor Scott's "Finish in Four, Save More" challenge encourages universities and colleges to "make it easier for students to get class credit for internships in their fields, which puts students on the path to getting a good paying job." Office of the Governor, *Governor Rick Scott Issues "Finish in Four, Save More" Challenge to Universities and Colleges* (May 25, 2016) <http://www.flgov.com/2016/05/25/governor-rick-scott-issues-finish-in-four-save-more-challenge-to-universities-and-colleges/> (last visited Oct. 6, 2017).

<sup>119</sup> Section 1008.02(1), F.S.

<sup>120</sup> *Id.* Strategies include modularized instruction that is customized and targeted to address specific skills gaps, compressed course structures that accelerate student progression from developmental instruction to college level coursework, contextualized developmental instruction that is related to meta-majors, and corequisite developmental instruction or tutoring that supplements credit instruction while a student is concurrently enrolled in a credit-bearing course.

<sup>121</sup> *Id.*

<sup>122</sup> Rule 6A-14.030(12), F.A.C.

<sup>123</sup> Section 1008.30(5)(a), F.S.

<sup>124</sup> Section 1008.30(5)(c), F.S.

<sup>125</sup> Board of Governors Regulation 6.008(1).

<sup>126</sup> Section 1008.02, F.S.

<sup>127</sup> Board of Governors Regulation 6.008(1).

revise its developmental education program to incorporate the developmental education strategies specified in law. Currently, each FCS institution board of trustees must develop a plan to implement the developmental education strategies defined in law.<sup>128</sup>

### *State University System Direct Support Organizations*

#### *Present Situation*

Each of the 12 state universities has at least one direct-support organization (DSO).<sup>129</sup> A state university DSO is:<sup>130</sup>

- A Florida corporation not for profit, incorporated under the provisions of chapter 617, and approved by the Department of State;
- Organized and operated exclusively to receive, hold, invest, and administer property and to make expenditures to, or for the benefit of, a state university; and
- An organization reviewed and certified by the state university board of trustees (BOT) to be operating in a manner consistent with the goals of the college or university and in the best interest of the state.

State university boards of trustees are currently authorized to permit the use of property, facilities, and personal services at their college or university by the university DSOs.<sup>131</sup>

“Personal services” includes full-time or part-time personnel as well as payroll processing.<sup>132</sup>

Each state university board of trustees must establish conditions with which a DSO must comply in order to use university property, facilities, or personal services and such additional conditions, controls, and requirements for support organizations as each board deems appropriate to provide for budget and audit review and oversight.<sup>133</sup>

State university DSOs are currently prohibited from giving, either directly or indirectly, any gift to a political committee for any purpose other than those certified by a majority roll call vote of the governing board of the DSO at a regularly scheduled meeting as being directly related to the educational mission of the institution.<sup>134</sup>

Currently, all records of the state university DSOs other than the auditor’s report, management letter, and any supplemental data requested by the BOG, university BOT, the Auditor General, and the Office of Program Policy Analysis and Government Accountability are confidential.<sup>135</sup>

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<sup>128</sup> Section 1008.30(5)(a), F.S.

<sup>129</sup> State University System of Florida, *University Direct-Support Organizations*, July 2016, available at [http://www.flbog.edu/pressroom/doc/DSO\\_Info\\_Brief\\_with\\_Attachments.pdf](http://www.flbog.edu/pressroom/doc/DSO_Info_Brief_with_Attachments.pdf).

<sup>130</sup> Section 1004.28(1)(a), F.S.

<sup>131</sup> *Id.* at (2)(a). Currently, all state universities, except for New College of Florida, have at least one DSO that utilizes state university personal services. Board of Governors, *2018 Bill Analysis for SB 4* (Sept. 22, 2017), at 9.

<sup>132</sup> Section 1004.28(1)(b).

<sup>133</sup> Board of Governors Regulation 9.011(1).

<sup>134</sup> Section 1004.28(4), F.S. Currently, state university DSOs do not give gifts to political committees. Board of Governors, *2018 Agency Bill Analysis for SB 4* (Sept. 22, 2017), at 10.

<sup>135</sup> *Id.* at (5)(b).

*Effect of Proposed Changes*

The bill enhances transparency and strengthens accountability for state university DSOs. Specifically, the bill:

- Prohibits state university BOTs from permitting:
  - Any university DSO to use personal services beginning July 1, 2023.<sup>136</sup>
  - The use of state funds for travel expenses by any university DSO.
- Specifies that records related to the expenditure of state funds, and records related to the expenditure of private funds for travel are not confidential and not exempt from public records requirements. Accordingly, the bill narrows the scope of the exemption from public records requirements for a state university DSO.
- Reinforces the prohibition in current law that a state university DSO may not give, either directly or indirectly, any gift to a political committee. Specifically, the bill eliminates the exception that allows gifts certified by a majority roll call vote of the governing board of the DSO at a regularly scheduled meeting as being directly related to the educational mission of the university.

The bill takes effect upon becoming a law.

**IV. Constitutional Issues:**

## A. Municipality/County Mandates Restrictions:

None.

## B. Public Records/Open Meetings Issues:

None.

## C. Trust Funds Restrictions:

None.

**V. Fiscal Impact Statement:**

## A. Tax/Fee Issues:

None.

## B. Private Sector Impact:

SB 4 increases financial aid and tuition assistance to students. Specifically, the bill:

- Modifies the Florida Medallion Scholars (FMS) award to an amount equal to 75 percent of public postsecondary education institution tuition and specified fees for educational expenses. The increase in the FMS award to cover 75 percent of tuition

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<sup>136</sup> According to the BOG, the prohibition on the use of personal services by a state university DSO may limit or reduce the number of staff working for the state university DSOs. Board of Governors, *2018 Agency Bill Analysis for SB 4* (Sept. 22, 2017), at 9.



and specified fees may increase the current average FMS award per academic year by approximately:

- \$2,000 if the student is enrolled at a 4-year institution.
- \$300 if the student is enrolled at a 2-year institution.
- Expands the Benacquisto Scholarship Program to include out-of-state National Merit Scholar students who meet the specified eligibility criteria, which is likely to provide a significant cost savings to such students. Such students may be eligible for an annual award of approximately \$21,201.
- Doubles the state match for the First Generation in College Matching Grant, which is likely to make the matching grant available to more students, or result in an increased award amount for eligible students.
- Establishes the Florida Farmworker Student Scholarship Program for farmworkers and the children of farmworkers. Scholarship recipients are eligible for an award equal to 100 percent of tuition and specified fees at a public postsecondary institution. A scholarship recipient who enrolls in 30 credit hours per academic year at a state university is estimated to receive an award of approximately \$6,000.
- Requires state universities to adopt and implement a block tuition policy that may provide a cost savings to students, but the potential savings are indeterminate.

### C. Government Sector Impact:

The bill has the following fiscal impact:

- Codifies the funding for the Florida Academic Scholars (FAS) award in the 2017-2018 General Appropriations Act (GAA). The workload increase for the 2018-2019 fiscal year will cost an estimated \$21 million for 3,510 additional FAS students.<sup>137</sup>
- Increases the FMS award to cover 75 percent of tuition and specified fees. In 2018-2019, for 43,892 FMS-eligible students,<sup>138</sup> such increase in the FMS award is projected to cost an additional \$77 million<sup>139</sup> from the Educational Enhancement Trust Fund over the current projection for the FMS award of \$78 million.<sup>140</sup>
- Includes out-of-state students in the Benacquisto Scholarship Program, which may cost an estimated \$1.2 million from the General Revenue Fund for a projected 59 additional scholars.<sup>141</sup>

<sup>137</sup> Office of Economic & Demographic Research, *Florida Bright Futures Scholarship Program, Awards History and Forecast*, available at <http://edr.state.fl.us/Content/conferences/financialaid/ConferenceResults.pdf>, at 3. There are projected to be 46,570 FAS awards in 2017-2018, and 50,080 FAS awards in 2018-2019.

<sup>138</sup> *Id.*

<sup>139</sup> Senate staff analysis of Economic and Demographic Research, *Education Estimating Conference on Students Financial Aid Impact*, available at <http://edr.state.fl.us/Content/conferences/financialaidimpact/archives/170612financialaidimpact.pdf>, at 10.

<sup>140</sup> Office of Economic & Demographic Research, *Florida Bright Futures Scholarship Program, Awards History and Forecast*, available at <http://edr.state.fl.us/Content/conferences/financialaid/ConferenceResults.pdf>, at 7.

<sup>141</sup> Economic and Demographic Research, *Education Estimating Conference on Students Financial Aid Impact*, available at <http://edr.state.fl.us/Content/conferences/financialaidimpact/archives/170612financialaidimpact.pdf>, at 10.



Additionally, the fiscal impact is currently indeterminate for the bill provision that:

- Requires state universities to adopt and implement a block tuition policy for resident and non-resident undergraduate students at the state universities.
- Establishes the World Class Faculty and Scholar and State University Professional and Graduate Degree Excellence programs and specifies that funding must be as provided in the GAA.

**VI. Technical Deficiencies:**

None.

**VII. Related Issues:**

None.

**VIII. Statutes Affected:**

This bill substantially amends the following sections of the Florida Statutes: 1001.706, 1001.7065, 1001.92, 1004.28, 1008.30, 1009.22, 1009.23, 1009.24, 1009.53, 1009.534, 1009.535, 1009.701, 1009.893, and 1009.98.

This bill creates the following sections of the Florida Statutes: 1004.6497, 1004.6498, and 1009.894.

This bill creates three undesignated sections of the Florida Statutes.

**IX. Additional Information:**

**A. Committee Substitute – Statement of Changes:**

(Summarizing differences between the Committee Substitute and the prior version of the bill.)

None.

**B. Amendments:**

None.

By Senator Galvano

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1 A bill to be entitled  
 2 An act relating to higher education; providing a short  
 3 title; amending s. 1001.706, F.S.; requiring state  
 4 universities to identify internship opportunities in  
 5 high-demand fields; amending s. 1001.7065, F.S.;  
 6 revising the preeminent state research universities  
 7 program graduation rate requirements and funding  
 8 distributions; deleting the authority for such  
 9 universities to stipulate a special course requirement  
 10 for incoming students; requiring the Board of  
 11 Governors to establish certain standards by a  
 12 specified date; amending s. 1001.92, F.S.; requiring  
 13 certain performance-based metrics to include specified  
 14 graduation rates and access benchmarks; amending s.  
 15 1004.28, F.S.; directing a state university board of  
 16 trustees to limit the services, activities, and  
 17 expenses of its direct-support organizations;  
 18 requiring the chair of the board of trustees to  
 19 appoint at least one representative to the board of  
 20 directors and executive committee of a university  
 21 direct-support organization; requiring the disclosure  
 22 of certain financial documents; creating s. 1004.6497,  
 23 F.S.; establishing the World Class Faculty and Scholar  
 24 Program; providing the purpose and intent; authorizing  
 25 state university investments in certain faculty  
 26 retention, recruitment, and recognition activities;  
 27 specifying funding as provided in the General  
 28 Appropriations Act; requiring an annual report to the  
 29 Governor and the Legislature by a specified date;

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30 creating s. 1004.6498, F.S.; establishing the State  
 31 University Professional and Graduate Degree Excellence  
 32 Program; providing the purpose; listing the quality  
 33 improvement efforts that may be used to elevate the  
 34 prominence of state university medicine, law, and  
 35 graduate-level business programs; specifying funding  
 36 as provided in the General Appropriations Act;  
 37 requiring an annual report to the Governor and the  
 38 Legislature by a specified date; amending s. 1008.30,  
 39 F.S.; authorizing certain state universities to  
 40 continue to provide developmental education  
 41 instruction; amending ss. 1009.22 and 1009.23, F.S.;  
 42 removing the prohibition on the inclusion of a  
 43 technology fee in the Florida Bright Futures  
 44 Scholarship Program award; amending s. 1009.24, F.S.;  
 45 removing the prohibition on the inclusion of a  
 46 technology fee and a tuition differential fee in the  
 47 Florida Bright Futures Scholarship Program award;  
 48 requiring each state university board of trustees to  
 49 implement a block tuition policy for specified  
 50 undergraduate students beginning in a specified  
 51 academic semester; requiring the Chancellor of the  
 52 State University System to submit a report to the  
 53 Governor and the Legislature by a specified date;  
 54 amending s. 1009.53, F.S.; authorizing a student to  
 55 use Florida Bright Futures Scholarship Program awards  
 56 for summer term enrollment; amending s. 1009.534,  
 57 F.S.; specifying Florida Academic Scholars award  
 58 amounts to cover tuition, fees, textbooks, and other

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59 educational expenses; amending s. 1009.535, F.S.;

60 specifying Florida Medallion Scholars award amounts to

61 cover specified tuition and fees; amending s.

62 1009.701, F.S.; revising the state-to-private match

63 requirement for contributions to the First Generation

64 Matching Grant Program beginning in a specified fiscal

65 year; extending the program to include Florida College

66 System institution students; amending s. 1009.893,

67 F.S.; extending coverage of the Benacquisto

68 Scholarship Program to include tuition and fees for

69 qualified nonresident students; creating s. 1009.894,

70 F.S.; creating the Florida Farmworker Student

71 Scholarship Program; providing a purpose; requiring

72 the Department of Education to administer the

73 scholarship program; providing student eligibility

74 criteria; specifying award amounts and distributions;

75 providing for funding as specified in the General

76 Appropriations Act; amending s. 1009.98, F.S.;

77 providing that certain payments from the Florida

78 Prepaid College Board to a state university on behalf

79 of a qualified beneficiary may not exceed a specified

80 amount; providing for retroactive application;

81 providing a directive to the Division of Law Revision

82 and Information; providing an effective date.

84 Be It Enacted by the Legislature of the State of Florida:

85

86 Section 1. This act shall be cited as the "Florida

87 Excellence in Higher Education Act of 2018."

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88 Section 2. Paragraph (b) of subsection (5) of section

89 1001.706, Florida Statutes, is amended to read:

90 1001.706 Powers and duties of the Board of Governors.—

91 (5) POWERS AND DUTIES RELATING TO ACCOUNTABILITY.—

92 (b) The Board of Governors shall develop a strategic plan

93 specifying goals and objectives for the State University System

94 and each constituent university, including each university's

95 contribution to overall system goals and objectives. The

96 strategic plan must:

97 1. Include performance metrics and standards common for all

98 institutions and metrics and standards unique to institutions

99 depending on institutional core missions, including, but not

100 limited to, student admission requirements, retention,

101 graduation, percentage of graduates who have attained

102 employment, percentage of graduates enrolled in continued

103 education, licensure passage, average wages of employed

104 graduates, average cost per graduate, excess hours, student loan

105 burden and default rates, faculty awards, total annual research

106 expenditures, patents, licenses and royalties, intellectual

107 property, startup companies, annual giving, endowments, and

108 well-known, highly respected national rankings for institutional

109 and program achievements.

110 2. Consider reports and recommendations of the Higher

111 Education Coordinating Council pursuant to s. 1004.015 and the

112 Articulation Coordinating Committee pursuant to s. 1007.01.

113 3. Include student enrollment and performance data

114 delineated by method of instruction, including, but not limited

115 to, traditional, online, and distance learning instruction.

116 4. Include criteria for designating baccalaureate degree

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117 and master's degree programs at specified universities as high-  
 118 demand programs of emphasis. Fifty percent of the criteria for  
 119 designation as high-demand programs of emphasis must be based on  
 120 achievement of performance outcome thresholds determined by the  
 121 Board of Governors, and 50 percent of the criteria must be based  
 122 on achievement of performance outcome thresholds specifically  
 123 linked to:

124 a. Job placement in employment of 36 hours or more per week  
 125 and average full-time wages of graduates of the degree programs  
 126 1 year and 5 years after graduation, based in part on data  
 127 provided in the economic security report of employment and  
 128 earning outcomes produced annually pursuant to s. 445.07.

129 b. Data-driven gap analyses, conducted by the Board of  
 130 Governors, of the state's job market demands and the outlook for  
 131 jobs that require a baccalaureate or higher degree. Each state  
 132 university must use the gap analyses to identify internship  
 133 opportunities for students to benefit from mentorship by  
 134 industry experts, earn industry certifications, and become  
 135 employed in high-demand fields.

136 Section 3. Paragraph (d) of subsection (2), paragraph (c)  
 137 of subsection (5), and subsections (6), (7), and (8) of section  
 138 1001.7065, Florida Statutes, are amended to read:

139 1001.7065 Preeminent state research universities program.—

140 (2) ACADEMIC AND RESEARCH EXCELLENCE STANDARDS.—The  
 141 following academic and research excellence standards are  
 142 established for the preeminent state research universities  
 143 program:

144 (d) A 4-year graduation rate of 60 percent or higher for  
 145 full-time, first-time-in-college students, as reported annually

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146 to the IPEDS. However, for the 2018 determination of a state  
 147 university's preeminence designation and the related  
 148 distribution of the 2018-2019 fiscal year appropriation  
 149 associated with preeminence and emerging preeminence, a  
 150 university is considered to have satisfied this graduation rate  
 151 measure by attaining a 6-year graduation rate of 70 percent or  
 152 higher by October 1, 2017, for full-time, first-time-in-college  
 153 students, as reported annually to the IPEDS and confirmed by the  
 154 Board of Governors.

155 (5) PREEMINENT STATE RESEARCH UNIVERSITIES PROGRAM  
 156 SUPPORT.—

157 (c) The award of funds under this subsection is contingent  
 158 upon funding provided in the General Appropriations Act to  
 159 support the preeminent state research universities program  
 160 created under this section. Funding increases appropriated  
 161 beyond the amounts funded in the previous fiscal year shall be  
 162 distributed as follows:

163 1. Each designated preeminent state research university  
 164 that meets the criteria in paragraph (a) shall receive an equal  
 165 amount of funding.

166 2. Each designated emerging preeminent state research  
 167 university that meets the criteria in paragraph (b) shall,  
 168 beginning in the 2018-2019 fiscal year, receive an amount of  
 169 funding that is equal to one-fourth ~~one-half~~ of the total  
 170 increased amount awarded to each designated preeminent state  
 171 research university.

172 ~~(6) PREEMINENT STATE RESEARCH UNIVERSITY SPECIAL COURSE~~  
 173 ~~REQUIREMENT AUTHORITY. In order to provide a jointly shared~~  
 174 ~~educational experience, a university that is designated a~~

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175 ~~preeminent state research university may require its incoming~~  
 176 ~~first-time-in-college students to take a six-credit set of~~  
 177 ~~unique courses specifically determined by the university and~~  
 178 ~~published on the university's website. The university may~~  
 179 ~~stipulate that credit for such courses may not be earned through~~  
 180 ~~any acceleration mechanism pursuant to s. 1007.27 or s. 1007.271~~  
 181 ~~or any other transfer credit. All accelerated credits earned up~~  
 182 ~~to the limits specified in ss. 1007.27 and 1007.271 shall be~~  
 183 ~~applied toward graduation at the student's request.~~

184 (6)(7) PREEMINENT STATE RESEARCH UNIVERSITY FLEXIBILITY  
 185 AUTHORITY.—The Board of Governors is encouraged to identify and  
 186 grant all reasonable, feasible authority and flexibility to  
 187 ensure that each designated preeminent state research university  
 188 and each designated emerging preeminent state research  
 189 university is free from unnecessary restrictions.

190 (7)(8) PROGRAMS OF EXCELLENCE THROUGHOUT THE STATE  
 191 UNIVERSITY SYSTEM.—The Board of Governors shall ~~is encouraged to~~  
 192 establish standards and measures whereby individual  
 193 undergraduate, graduate, and professional degree programs in  
 194 state universities which ~~that~~ objectively reflect national  
 195 excellence can be identified and make recommendations to the  
 196 Legislature by September 1, 2018, as to how any such programs  
 197 could be enhanced and promoted.

198 Section 4. Subsection (1) of section 1001.92, Florida  
 199 Statutes, is amended to read:

200 1001.92 State University System Performance-Based  
 201 Incentive.—

202 (1) A State University System Performance-Based Incentive  
 203 shall be awarded to state universities using performance-based

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204 metrics adopted by the Board of Governors of the State  
 205 University System. Beginning with the Board of Governors'  
 206 determination of each university's performance improvement and  
 207 achievement ratings for 2018, and the related distribution of  
 208 the 2018-2019 fiscal year appropriation, the performance-based  
 209 metrics must include 4-year graduation rates; retention rates;  
 210 postgraduation education rates; degree production;  
 211 affordability; postgraduation employment and salaries, including  
 212 wage thresholds that reflect the added value of a baccalaureate  
 213 degree; access, with benchmarks that reward institutions with  
 214 access rates at or above 50 percent; and other metrics approved  
 215 by the board in a formally noticed meeting. The board shall  
 216 adopt benchmarks to evaluate each state university's performance  
 217 on the metrics to measure the state university's achievement of  
 218 institutional excellence or need for improvement and minimum  
 219 requirements for eligibility to receive performance funding.

220 Section 5. Subsections (2), (3), and (4) and paragraph (b)  
 221 of subsection (5) of section 1004.28, Florida Statutes, are  
 222 amended to read:

223 1004.28 Direct-support organizations; use of property;  
 224 board of directors; activities; audit; facilities.—

225 (2) USE OF PROPERTY.—

226 (a) Each state university board of trustees is authorized  
 227 to permit the use of property, facilities, and personal services  
 228 at any state university by any university direct-support  
 229 organization, and, subject to the provisions of this section,  
 230 direct-support organizations may establish accounts with the  
 231 State Board of Administration for investment of funds pursuant  
 232 to part IV of chapter 218. Beginning July 1, 2023, a state

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233 university board of trustees may not permit any university  
 234 direct-support organization to use personal services.

235 (b) The board of trustees, in accordance with regulations  
 236 ~~rules~~ and guidelines of the Board of Governors, shall prescribe  
 237 by regulation ~~rule~~ conditions with which a university direct-  
 238 support organization must comply in order to use property,  
 239 facilities, or personal services at any state university. Such  
 240 regulations ~~rules~~ shall provide for budget and audit review and  
 241 oversight by the board of trustees.

242 (c) The board of trustees shall not permit the use of  
 243 property, facilities, or personal services at any state  
 244 university by any university direct-support organization that  
 245 does not provide equal employment opportunities to all persons  
 246 regardless of race, color, religion, gender, age, or national  
 247 origin.

248 (d) The board of trustees may not permit the use of state  
 249 funds for travel expenses by any university direct-support  
 250 organization.

251 (3) BOARD OF DIRECTORS.—The chair of the university board  
 252 of trustees shall may appoint at least one ~~a~~ representative to  
 253 the board of directors and the executive committee of any  
 254 direct-support organization established under this section. The  
 255 president of the university for which the direct-support  
 256 organization is established, or his or her designee, shall also  
 257 serve on the board of directors and the executive committee of  
 258 any direct-support organization established to benefit that  
 259 university.

260 (4) ACTIVITIES; RESTRICTION.—A university direct-support  
 261 organization is prohibited from giving, either directly or

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262 indirectly, any gift to a political committee as defined in s.  
 263 106.011 for any purpose ~~other than those certified by a majority~~  
 264 ~~roll call vote of the governing board of the direct-support~~  
 265 ~~organization at a regularly scheduled meeting as being directly~~  
 266 ~~related to the educational mission of the university.~~

267 (5) ANNUAL AUDIT; PUBLIC RECORDS EXEMPTION; PUBLIC MEETINGS  
 268 EXEMPTION.—

269 (b) All records of the organization other than the  
 270 auditor's report, management letter, any records related to the  
 271 expenditure of state funds, any records related to the  
 272 expenditure of private funds for travel, and any supplemental  
 273 data requested by the Board of Governors, the university board  
 274 of trustees, the Auditor General, and the Office of Program  
 275 Policy Analysis and Government Accountability shall be  
 276 confidential and exempt from s. 119.07(1).

277 Section 6. Section 1004.6497, Florida Statutes, is created  
 278 to read:

279 1004.6497 World Class Faculty and Scholar Program.—

280 (1) PURPOSE AND LEGISLATIVE INTENT.—The World Class Faculty  
 281 and Scholar Program is established to fund, beginning in the  
 282 2017-2018 fiscal year, and support the efforts of state  
 283 universities to recruit and retain exemplary faculty and  
 284 research scholars. It is the intent of the Legislature to  
 285 elevate the national competitiveness of Florida's state  
 286 universities through faculty and scholar recruitment and  
 287 retention.

288 (2) INVESTMENTS.—Retention, recruitment, and recognition  
 289 efforts, activities, and investments may include, but are not  
 290 limited to, investments in research-centric cluster hires,

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291 faculty research and research commercialization efforts,  
 292 instructional and research infrastructure, undergraduate student  
 293 participation in research, professional development, awards for  
 294 outstanding performance, and postdoctoral fellowships.  
 295 (3) FUNDING AND USE.—Funding for the program shall be as  
 296 provided in the General Appropriations Act. Each state  
 297 university shall use the funds only for the purpose and  
 298 investments authorized under this section. These funds may not  
 299 be used to construct buildings.  
 300 (4) ACCOUNTABILITY.—By March 15 of each year, the Board of  
 301 Governors shall provide to the Governor, the President of the  
 302 Senate, and the Speaker of the House of Representatives a report  
 303 summarizing information from the universities in the State  
 304 University System, including, but not limited to:  
 305 (a) Specific expenditure information as it relates to the  
 306 investments identified in subsection (2).  
 307 (b) The impact of those investments in elevating the  
 308 national competitiveness of the universities, specifically  
 309 relating to:  
 310 1. The success in recruiting research faculty and the  
 311 resulting research funding;  
 312 2. The 4-year graduation rate for undergraduate students;  
 313 3. The number of undergraduate courses offered with fewer  
 314 than 50 students; and  
 315 4. The increase in national academic standing of targeted  
 316 programs, specifically advancement in ranking among top 50  
 317 universities in the targeted programs in well-known and highly  
 318 respected national public university rankings, including, but  
 319 not limited to, the U.S. News and World Report rankings, which

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320 reflect national preeminence, using the most recent rankings.  
 321 Section 7. Section 1004.6498, Florida Statutes, is created  
 322 to read:  
 323 1004.6498 State University Professional and Graduate Degree  
 324 Excellence Program.—  
 325 (1) PURPOSE.—The State University Professional and Graduate  
 326 Degree Excellence Program is established to fund, beginning in  
 327 the 2017-2018 fiscal year, and support the efforts of state  
 328 universities to enhance the quality and excellence of  
 329 professional and graduate schools and degree programs in  
 330 medicine, law, and business and expand the economic impact of  
 331 state universities.  
 332 (2) INVESTMENTS.—Quality improvement efforts may include,  
 333 but are not limited to, targeted investments in faculty,  
 334 students, research, infrastructure, and other strategic  
 335 endeavors to elevate the national and global prominence of state  
 336 university medicine, law, and graduate-level business programs.  
 337 (3) FUNDING AND USE.—Funding for the program shall be as  
 338 provided in the General Appropriations Act. Each state  
 339 university shall use the funds only for the purpose and  
 340 investments authorized under this section. These funds may not  
 341 be used to construct buildings.  
 342 (4) ACCOUNTABILITY.—By March 15 of each year, the Board of  
 343 Governors shall provide to the Governor, the President of the  
 344 Senate, and the Speaker of the House of Representatives a report  
 345 summarizing information from the universities in the State  
 346 University System, including, but not limited to:  
 347 (a) Specific expenditure information as it relates to the  
 348 investments identified in subsection (2).

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349 (b) The impact of those investments in elevating the  
 350 national and global prominence of the state university medicine,  
 351 law, and graduate-level business programs, specifically relating  
 352 to:

353 1. The first-time pass rate on the United States Medical  
 354 Licensing Examination;

355 2. The first-time pass rate on The Florida Bar Examination;

356 3. The percentage of graduates enrolled or employed at a  
 357 wage threshold that reflects the added value of a graduate-level  
 358 business degree;

359 4. The advancement in the rankings of the state university  
 360 medicine, law, and graduate-level programs in well-known and  
 361 highly respected national graduate-level university rankings,  
 362 including, but not limited to, the U.S. News and World Report  
 363 rankings, which reflect national preeminence, using the most  
 364 recent rankings; and

365 5. The added economic benefit of the universities to the  
 366 state.

367 Section 8. Paragraph (c) of subsection (5) of section  
 368 1008.30, Florida Statutes, is amended to read:

369 1008.30 Common placement testing for public postsecondary  
 370 education.-

371 (5)

372 (c) A university board of trustees may contract with a  
 373 Florida College System institution board of trustees for the  
 374 Florida College System institution to provide developmental  
 375 education on the state university campus. Any state university  
 376 in which the percentage of incoming students requiring  
 377 developmental education equals or exceeds the average percentage

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378 of such students for the Florida College System may offer  
 379 developmental education without contracting with a Florida  
 380 College System institution; however, any state university  
 381 offering college-preparatory instruction as of January 1, 1996,  
 382 may continue to provide developmental education instruction as  
 383 defined in s. 1008.02(1) ~~such services.~~

384 Section 9. Subsection (7) of section 1009.22, Florida  
 385 Statutes, is amended to read:

386 1009.22 Workforce education postsecondary student fees.-

387 (7) Each district school board and Florida College System  
 388 institution board of trustees is authorized to establish a  
 389 separate fee for technology, not to exceed 5 percent of tuition  
 390 per credit hour or credit-hour equivalent for resident students  
 391 and not to exceed 5 percent of tuition and the out-of-state fee  
 392 per credit hour or credit-hour equivalent for nonresident  
 393 students. Revenues generated from the technology fee shall be  
 394 used to enhance instructional technology resources for students  
 395 and faculty ~~and shall not be included in any award under the~~  
 396 ~~Florida Bright Futures Scholarship Program.~~ Fifty percent of  
 397 technology fee revenues may be pledged by a Florida College  
 398 System institution board of trustees as a dedicated revenue  
 399 source for the repayment of debt, including lease-purchase  
 400 agreements, not to exceed the useful life of the asset being  
 401 financed. Revenues generated from the technology fee may not be  
 402 bonded.

403 Section 10. Subsection (10) of section 1009.23, Florida  
 404 Statutes, is amended to read:

405 1009.23 Florida College System institution student fees.-

406 (10) Each Florida College System institution board of

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407 trustees is authorized to establish a separate fee for  
 408 technology, which may not exceed 5 percent of tuition per credit  
 409 hour or credit-hour equivalent for resident students and may not  
 410 exceed 5 percent of tuition and the out-of-state fee per credit  
 411 hour or credit-hour equivalent for nonresident students.  
 412 Revenues generated from the technology fee shall be used to  
 413 enhance instructional technology resources for students and  
 414 faculty. The technology fee may apply to both college credit and  
 415 developmental education ~~and shall not be included in any award~~  
 416 ~~under the Florida Bright Futures Scholarship Program.~~ Fifty  
 417 percent of technology fee revenues may be pledged by a Florida  
 418 College System institution board of trustees as a dedicated  
 419 revenue source for the repayment of debt, including lease-  
 420 purchase agreements, not to exceed the useful life of the asset  
 421 being financed. Revenues generated from the technology fee may  
 422 not be bonded.

423 Section 11. Subsection (13), paragraph (r) of subsection  
 424 (14), paragraphs (a) and (b) of subsection (15), paragraphs (a),  
 425 (b), and (e) of subsection (16), and subsection (20) of section  
 426 1009.24, Florida Statutes, are amended to read:

427 1009.24 State university student fees.—

428 (13) Each university board of trustees may establish a  
 429 technology fee of up to 5 percent of the tuition per credit  
 430 hour. The revenue from this fee shall be used to enhance  
 431 instructional technology resources for students and faculty. ~~The~~  
 432 ~~technology fee may not be included in any award under the~~  
 433 ~~Florida Bright Futures Scholarship Program established pursuant~~  
 434 ~~to ss. 1009.53-1009.538.~~

435 (14) Except as otherwise provided in subsection (15), each

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436 university board of trustees is authorized to establish the  
 437 following fees:

438 (r) Traffic and parking fines, charges for parking decals,  
 439 and transportation access fees. Only universitywide  
 440 transportation access fees may be included in any state  
 441 financial assistance award authorized under part III of chapter  
 442 1009, as specifically authorized by law or the General  
 443 Appropriations Act.

444 With the exception of housing rental rates and except as  
 445 otherwise provided, fees assessed pursuant to paragraphs (h)-(s)  
 446 shall be based on reasonable costs of services. The Board of  
 447 Governors shall adopt regulations and timetables necessary to  
 448 implement the fees and fines authorized under this subsection.  
 449 The fees assessed under this subsection may be used for debt  
 450 only as authorized under s. 1010.62.

452 (15) (a) The Board of Governors may approve:

453 1. A proposal from a university board of trustees to  
 454 establish a new student fee that is not specifically authorized  
 455 by this section.

456 2. A proposal from a university board of trustees to  
 457 increase the current cap for an existing fee authorized pursuant  
 458 to paragraphs (14) (a)-(g).

459 3. a. A proposal from a university board of trustees to  
 460 implement flexible tuition policies, such as undergraduate or  
 461 graduate block tuition, block tuition differential, or market  
 462 tuition rates for graduate-level online courses or graduate-  
 463 level courses offered through a university's continuing  
 464 education program. A block tuition policy for resident

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465 undergraduate students or undergraduate-level courses must ~~shall~~  
 466 be based on the per-credit-hour undergraduate tuition  
 467 established under subsection (4). A block tuition policy for  
 468 nonresident undergraduate students must ~~shall~~ be based on the  
 469 per-credit-hour undergraduate tuition and out-of-state fee  
 470 established under subsection (4). Flexible tuition policies,  
 471 including block tuition, may not increase the state's fiscal  
 472 liability or obligation.

473 b. A block tuition policy, which must be adopted by each  
 474 university board of trustees for implementation beginning in the  
 475 fall 2018 academic semester. The policy must apply to the  
 476 entering freshman class of full-time, first-time-in-college  
 477 students and may be extended to include other enrolled students.  
 478 The policy must, at a minimum:

479 (I) Include block tuition and any required fees, including,  
 480 but not limited to, tuition differential fees, activity and  
 481 service fees, financial aid fees, capital improvement fees,  
 482 athletic fees, health fees, and technology fees.

483 (II) Require the university to maximize the application of  
 484 appropriate accelerated credits to minimize unnecessary credits  
 485 and excess hours.

486 (III) Enable students to have the flexibility to earn at  
 487 least 30 credits per academic year in any combination of fall,  
 488 spring, and summer academic terms or semesters.

489 (b) A proposal developed pursuant to paragraph (a) shall be  
 490 submitted in accordance with the public notification  
 491 requirements of subsection (20) and guidelines established by  
 492 the Board of Governors. Approval by the Board of Governors of  
 493 such proposals ~~proposal~~ must be made in accordance with ~~the~~

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494 ~~provisions of this subsection. By April 1, 2018, each state~~  
 495 university board of trustees must submit to the Board of  
 496 Governors its block tuition policy, adopted pursuant to  
 497 subparagraph (a)3., along with information on the potential  
 498 impact of the policy on students. By August 1, 2018, the  
 499 Chancellor of the State University System must submit to the  
 500 Governor, the President of the Senate, and the Speaker of the  
 501 House of Representatives a summary report of such policies, the  
 502 status of the board's review and approval of such policies, and  
 503 the board's recommendations for improving block tuition and fee  
 504 benefits for students.

505 (16) Each university board of trustees may establish a  
 506 tuition differential for undergraduate courses upon receipt of  
 507 approval from the Board of Governors. However, beginning July 1,  
 508 2014, the Board of Governors may only approve the establishment  
 509 of or an increase in tuition differential for a state research  
 510 university designated as a preeminent state research university  
 511 pursuant to s. 1001.7065(3). The tuition differential shall  
 512 promote improvements in the quality of undergraduate education  
 513 and shall provide financial aid to undergraduate students who  
 514 exhibit financial need.

515 (a) Seventy percent of the revenues from the tuition  
 516 differential shall be expended for purposes of undergraduate  
 517 education. Such expenditures may include, but are not limited  
 518 to, increasing course offerings, improving graduation rates,  
 519 increasing the percentage of undergraduate students who are  
 520 taught by faculty, decreasing student-faculty ratios, providing  
 521 salary increases for faculty who have a history of excellent  
 522 teaching in undergraduate courses, improving the efficiency of

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523 the delivery of undergraduate education through academic  
 524 advisement and counseling, and reducing the percentage of  
 525 students who graduate with excess hours. This expenditure for  
 526 undergraduate education may not be used to pay the salaries of  
 527 graduate teaching assistants. Except as otherwise provided in  
 528 this subsection, the remaining 30 percent of the revenues from  
 529 the tuition differential, or the equivalent amount of revenue  
 530 from private sources, shall be expended to provide financial aid  
 531 to undergraduate students who exhibit financial need, including  
 532 students who are scholarship recipients under s. 1009.984, to  
 533 meet the cost of university attendance. This expenditure for  
 534 need-based financial aid shall not supplant the amount of need-  
 535 based aid provided to undergraduate students in the preceding  
 536 fiscal year from financial aid fee revenues, the direct  
 537 appropriation for financial assistance provided to state  
 538 universities in the General Appropriations Act, or from private  
 539 sources. The total amount of tuition differential waived under  
 540 subparagraph (b)7. ~~(b)8.~~ may be included in calculating the  
 541 expenditures for need-based financial aid to undergraduate  
 542 students required by this subsection. If the entire tuition and  
 543 fee costs of resident students who have applied for and received  
 544 Pell Grant funds have been met and the university has excess  
 545 funds remaining from the 30 percent of the revenues from the  
 546 tuition differential required to be used to assist students who  
 547 exhibit financial need, the university may expend the excess  
 548 portion in the same manner as required for the other 70 percent  
 549 of the tuition differential revenues.

550 (b) Each tuition differential is subject to the following  
 551 conditions:

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552 1. The tuition differential may be assessed on one or more  
 553 undergraduate courses or on all undergraduate courses at a state  
 554 university.  
 555 2. The tuition differential may vary by course or courses,  
 556 by campus or center location, and by institution. Each  
 557 university board of trustees shall strive to maintain and  
 558 increase enrollment in degree programs related to math, science,  
 559 high technology, and other state or regional high-need fields  
 560 when establishing tuition differentials by course.  
 561 3. For each state university that is designated as a  
 562 preeminent state research university by the Board of Governors,  
 563 pursuant to s. 1001.7065, the aggregate sum of tuition and the  
 564 tuition differential may be increased by no more than 6 percent  
 565 of the total charged for the aggregate sum of these fees in the  
 566 preceding fiscal year. The tuition differential may be increased  
 567 if the university meets or exceeds performance standard targets  
 568 for that university established annually by the Board of  
 569 Governors for the following performance standards, amounting to  
 570 no more than a 2-percent increase in the tuition differential  
 571 for each performance standard:  
 572 a. An increase in the 4-year ~~6-year~~ graduation rate for  
 573 full-time, first-time-in-college students, as reported annually  
 574 to the Integrated Postsecondary Education Data System.  
 575 b. An increase in the total annual research expenditures.  
 576 c. An increase in the total patents awarded by the United  
 577 States Patent and Trademark Office for the most recent years.  
 578 4. The aggregate sum of undergraduate tuition and fees per  
 579 credit hour, including the tuition differential, may not exceed  
 580 the national average of undergraduate tuition and fees at 4-year

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581 degree-granting public postsecondary educational institutions.

582 ~~5. The tuition differential shall not be included in any~~  
 583 ~~award under the Florida Bright Futures Scholarship Program~~  
 584 ~~established pursuant to ss. 1009.53-1009.538.~~

585 ~~5.6.~~ Beneficiaries having prepaid tuition contracts  
 586 pursuant to s. 1009.98(2)(b) which were in effect on July 1,  
 587 2007, and which remain in effect, are exempt from the payment of  
 588 the tuition differential.

589 ~~6.7.~~ The tuition differential may not be charged to any  
 590 student who was in attendance at the university before July 1,  
 591 2007, and who maintains continuous enrollment.

592 ~~7.8.~~ The tuition differential may be waived by the  
 593 university for students who meet the eligibility requirements  
 594 for the Florida public student assistance grant established in  
 595 s. 1009.50.

596 ~~8.9.~~ Subject to approval by the Board of Governors, the  
 597 tuition differential authorized pursuant to this subsection may  
 598 take effect with the 2009 fall term.

599 (e) The Board of Governors shall submit a report to the  
 600 President of the Senate, the Speaker of the House of  
 601 Representatives, and the Governor describing the implementation  
 602 of the provisions of this subsection no later than February 1 of  
 603 each year. The report shall summarize proposals received by the  
 604 board during the preceding fiscal year and actions taken by the  
 605 board in response to such proposals. In addition, the report  
 606 shall provide the following information for each university that  
 607 has been approved by the board to assess a tuition differential:

608 1. The course or courses for which the tuition differential  
 609 was assessed and the amount assessed.

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610 2. The total revenues generated by the tuition  
 611 differential.

612 3. With respect to waivers authorized under subparagraph  
 613 ~~(b)7. (b)8.~~, the number of students eligible for a waiver, the  
 614 number of students receiving a waiver, and the value of waivers  
 615 provided.

616 4. Detailed expenditures of the revenues generated by the  
 617 tuition differential.

618 5. Changes in retention rates, graduation rates, the  
 619 percentage of students graduating with more than 110 percent of  
 620 the hours required for graduation, pass rates on licensure  
 621 examinations, the number of undergraduate course offerings, the  
 622 percentage of undergraduate students who are taught by faculty,  
 623 student-faculty ratios, and the average salaries of faculty who  
 624 teach undergraduate courses.

625 (20) Each state university shall publicly notice and notify  
 626 all enrolled students of any proposal to change ~~increase~~ tuition  
 627 or fees at least 28 days before its consideration at a board of  
 628 trustees meeting. The notice must:

629 (a) Include the date and time of the meeting at which the  
 630 proposal will be considered.

631 (b) Specifically outline the details of existing tuition  
 632 and fees, the rationale for the proposed change ~~increase~~, and  
 633 how the funds from the proposed change ~~increase~~ will be used.

634 (c) Be posted on the university's website and issued in a  
 635 press release.

636 Section 12. Subsection (9) of section 1009.53, Florida  
 637 Statutes, is amended to read:

638 1009.53 Florida Bright Futures Scholarship Program.—

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639 (9) A student may use a Florida Academic Scholar ~~an~~ award  
 640 for summer term enrollment beginning in the 2018 summer term, as  
 641 funded in the General Appropriations Act. A student may use  
 642 other Florida Bright Futures Scholarship Program awards for  
 643 summer term enrollment, if funded in the General Appropriations  
 644 Act if funds are available.

645 Section 13. Subsection (2) of section 1009.534, Florida  
 646 Statutes, is amended to read:

647 1009.534 Florida Academic Scholars award.—

648 (2) A Florida Academic Scholar who is enrolled in a  
 649 certificate, diploma, associate, or baccalaureate degree program  
 650 at a public or nonpublic postsecondary education institution is  
 651 eligible, beginning in the 2017-2018 academic year, for an award  
 652 equal to the amount required to pay 100 percent of tuition and  
 653 fees established under ss. 1009.22(3), (5), (6), and (7);  
 654 1009.23(3), (4), (7), (8), (10), and (11); and 1009.24(4), (7)-  
 655 (13), (14) (r), and (16), as applicable, and is eligible for an  
 656 additional \$300 each fall and spring academic semester or the  
 657 equivalent for textbooks and ~~specified in the General~~  
 658 Appropriations Act to assist with the payment of educational  
 659 expenses.

660 Section 14. Subsection (2) of section 1009.535, Florida  
 661 Statutes, is amended to read:

662 1009.535 Florida Medallion Scholars award.—

663 (2) A Florida Medallion Scholar who is enrolled in a  
 664 certificate, diploma, associate, or baccalaureate degree program  
 665 at a public or nonpublic postsecondary education institution is  
 666 eligible, beginning in the fall 2018 semester, for an award  
 667 equal to the amount required to pay 75 percent of tuition and

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668 fees established under ss. 1009.22(3), (5), (6), and (7);  
 669 1009.23(3), (4), (7), (8), (10), and (11); and 1009.24(4), (7)-  
 670 (13), (14) (r), and (16), as applicable ~~specified in the General~~  
 671 Appropriations Act to assist with the payment of educational  
 672 expenses.

673 Section 15. Subsections (1), (2), and (4) and paragraph (c)  
 674 of subsection (5) of section 1009.701, Florida Statutes, are  
 675 amended to read:

676 1009.701 First Generation Matching Grant Program.—

677 (1) The First Generation Matching Grant Program is created  
 678 to enable each state university and Florida College System  
 679 institution to provide donors with a matching grant incentive  
 680 for contributions that will create grant-based student financial  
 681 aid for undergraduate students who demonstrate financial need  
 682 and whose parents, as defined in s. 1009.21(1), have not earned  
 683 a baccalaureate degree. In the case of any individual who  
 684 regularly resided with and received support from only one  
 685 parent, an individual whose only such parent did not complete a  
 686 baccalaureate degree would also be eligible.

687 (2) Funds appropriated by the Legislature for the program  
 688 shall be allocated by the Office of Student Financial Assistance  
 689 to match private contributions on a dollar-for-dollar basis;  
 690 however, beginning in the 2018-2019 fiscal year, such funds  
 691 shall be allocated at a ratio of \$2 of state funds to \$1 of  
 692 private contributions. Contributions made to a state university  
 693 or a Florida College System institution and pledged for the  
 694 purposes of this section are eligible for state matching funds  
 695 appropriated for this program and are not eligible for any other  
 696 state matching grant program. Pledged contributions are not

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697 eligible for matching prior to the actual collection of the  
 698 total funds. The Office of Student Financial Assistance shall  
 699 reserve a proportionate allocation of the total appropriated  
 700 funds for each state university and Florida College System  
 701 institution on the basis of full-time equivalent enrollment.  
 702 Funds that remain unmatched as of December 1 shall be  
 703 reallocated to state universities and colleges that have  
 704 remaining unmatched private contributions for the program on the  
 705 basis of full-time equivalent enrollment.

706 (4) Each participating state university and Florida College  
 707 System institution shall establish an application process,  
 708 determine student eligibility for initial and renewal awards in  
 709 conformance with subsection (5), identify the amount awarded to  
 710 each recipient, and notify recipients of the amount of their  
 711 awards.

712 (5) In order to be eligible to receive a grant pursuant to  
 713 this section, an applicant must:

714 (c) Be accepted at a state university or Florida College  
 715 System institution.

716 Section 16. Subsections (2), (4), and (5) of section  
 717 1009.893, Florida Statutes, are amended to read:

718 1009.893 Benacquisto Scholarship Program.—

719 (2) The Benacquisto Scholarship Program is created to  
 720 reward a any Florida high school graduate who receives  
 721 recognition as a National Merit Scholar or National Achievement  
 722 Scholar and who initially enrolls in the 2014-2015 academic year  
 723 or, later, in a baccalaureate degree program at an eligible  
 724 Florida public or independent postsecondary educational  
 725 institution.

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726 (4) In order to be eligible for an award under the  
 727 scholarship program, a student must meet the requirements of  
 728 paragraph (a) or paragraph (b).+

729 (a) A student who is a resident of the state, ~~Be a state~~  
 730 ~~resident~~ as determined in s. 1009.40 and rules of the State  
 731 Board of Education, must:+

732 1. ~~(b)~~ Earn a standard Florida high school diploma or its  
 733 equivalent pursuant to s. 1002.3105, s. 1003.4281, s. 1003.4282,  
 734 or s. 1003.435 unless:

735 a.1. The student completes a home education program  
 736 according to s. 1002.41; or

737 b.2. The student earns a high school diploma from a non-  
 738 Florida school while living with a parent who is on military or  
 739 public service assignment out of this state;

740 2. ~~(e)~~ Be accepted by and enroll in a Florida public or  
 741 independent postsecondary educational institution that is  
 742 regionally accredited; and

743 3. ~~(d)~~ Be enrolled full-time in a baccalaureate degree  
 744 program at an eligible regionally accredited Florida public or  
 745 independent postsecondary educational institution during the  
 746 fall academic term following high school graduation.

747 (b) A student who initially enrolls in a baccalaureate  
 748 degree program in the 2018-2019 academic year or later and who  
 749 is not a resident of this state, as determined in s. 1009.40 and  
 750 rules of the State Board of Education, must:

751 1. Physically reside in this state on or near the campus of  
 752 the postsecondary educational institution in which the student  
 753 is enrolled;

754 2. Earn a high school diploma from a school outside Florida

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755 which is comparable to a standard Florida high school diploma or  
 756 its equivalent pursuant to s. 1002.3105, s. 1003.4281, s.  
 757 1003.4282, or s. 1003.435 or must complete a home education  
 758 program in another state; and

759 3. Be accepted by and enrolled full-time in a baccalaureate  
 760 degree program at an eligible regionally accredited Florida  
 761 public or independent postsecondary educational institution  
 762 during the fall academic term following high school graduation.

763 (5) (a) 1. An eligible student who meets the requirements of  
 764 paragraph (4) (a), who is a National Merit Scholar or National  
 765 Achievement Scholar, and who attends a Florida public  
 766 postsecondary educational institution shall receive a  
 767 scholarship award equal to the institutional cost of attendance  
 768 minus the sum of the student's Florida Bright Futures  
 769 Scholarship and National Merit Scholarship or National  
 770 Achievement Scholarship.

771 2. An eligible student who meets the requirements under  
 772 paragraph (4) (b), who is a National Merit Scholar, and who  
 773 attends a Florida public postsecondary educational institution  
 774 shall receive a scholarship award equal to the institutional  
 775 cost of attendance for a resident of this state minus the  
 776 student's National Merit Scholarship. Such student is exempt  
 777 from the payment of out-of-state fees.

778 (b) An eligible student who is a National Merit Scholar or  
 779 National Achievement Scholar and who attends a Florida  
 780 independent postsecondary educational institution shall receive  
 781 a scholarship award equal to the highest cost of attendance for  
 782 a resident of this state enrolled at a Florida public  
 783 university, as reported by the Board of Governors of the State

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784 University System, minus the sum of the student's Florida Bright  
 785 Futures Scholarship and National Merit Scholarship or National  
 786 Achievement Scholarship.

787 Section 17. Section 1009.894, Florida Statutes, is created  
 788 to read:

789 1009.894 Florida Farmworker Student Scholarship Program.—  
 790 The Legislature recognizes the vital contribution of farmworkers  
 791 to the economy of this state. The Florida Farmworker Student  
 792 Scholarship Program is created to provide scholarships for  
 793 farmworkers, as defined in s. 420.503, and the children of such  
 794 farmworkers.

795 (1) The Department of Education shall administer the  
 796 Florida Farmworker Student Scholarship Program according to  
 797 rules and procedures established by the State Board of  
 798 Education. Beginning in the 2017-2018 academic year, up to 50  
 799 scholarships shall be awarded annually according to the criteria  
 800 established in subsection (2) and contingent upon an  
 801 appropriation in the General Appropriations Act.

802 (2) (a) To be eligible for an initial scholarship, a student  
 803 must, at a minimum:

804 1. Have a resident status as required by s. 1009.40 and  
 805 rules of the State Board of Education;

806 2. Earn a minimum cumulative weighted grade point average  
 807 of 3.5 for all high school courses creditable toward a diploma;

808 3. Complete a minimum of 30 hours of community service; and

809 4. Have at least a 90 percent attendance rate and not have  
 810 had any disciplinary action brought against him or her, as  
 811 documented on the student's high school transcript.

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813 For purposes of this section, students who are undocumented for  
 814 federal immigration purposes are not eligible for an award.

815 (b) The department shall rank eligible initial applicants  
 816 for the purposes of awarding scholarships based on need, as  
 817 determined by the department.

818 (c) To renew a scholarship awarded pursuant to this  
 819 section, a student must maintain at least a cumulative grade  
 820 point average of 2.5 or higher on a 4.0 scale for college  
 821 coursework.

822 (3) A scholarship recipient must enroll in a minimum of 12  
 823 credit hours per term, or the equivalent, at a public  
 824 postsecondary educational institution in this state to receive  
 825 funding.

826 (4) A scholarship recipient may receive an award for a  
 827 maximum of 100 percent of the number of credit hours required to  
 828 complete an associate or baccalaureate degree program or receive  
 829 an award for a maximum of 100 percent of the credit hours or  
 830 clock hours required to complete up to 90 credit hours of a  
 831 program that terminates in a career certificate. The scholarship  
 832 recipient is eligible for an award equal to the amount required  
 833 to pay the tuition and fees established under ss. 1009.22(3),  
 834 (5), (6), and (7); 1009.23(3), (4), (7), (8), (10), and (11);  
 835 and 1009.24(4), (7)-(13), (14)(r), and (16), as applicable, at a  
 836 public postsecondary educational institution in this state.  
 837 Renewal scholarship awards must take precedence over new  
 838 scholarship awards in a year in which funds are not sufficient  
 839 to accommodate both initial and renewal awards. The scholarship  
 840 must be prorated for any such year.

841 (5) Subject to appropriation in the General Appropriations

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CODING: Words ~~stricken~~ are deletions; words underlined are additions.

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20184\_\_

842 Act, the department shall annually issue awards from the  
 843 scholarship program. Before the registration period each  
 844 semester, the department shall transmit payment for each award  
 845 to the president or director of the postsecondary educational  
 846 institution, or his or her representative. However, the  
 847 department may withhold payment if the receiving institution  
 848 fails to submit the following reports or make the following  
 849 refunds to the department:

850 (a) Each institution shall certify to the department the  
 851 eligibility status of each student to receive a disbursement  
 852 within 30 days before the end of its regular registration  
 853 period, inclusive of a drop and add period. An institution is  
 854 not required to reevaluate the student eligibility after the end  
 855 of the drop and add period.

856 (b) An institution that receives funds from the scholarship  
 857 program must certify to the department the amount of funds  
 858 disbursed to each student and remit to the department any  
 859 undisbursed advance within 60 days after the end of the regular  
 860 registration period.

861 (6) The department shall allocate funds to the appropriate  
 862 institutions and collect and maintain data regarding the  
 863 scholarship program within the student financial assistance  
 864 database as specified in s. 1009.94.

865 (7) Funding for this program shall be as provided in the  
 866 General Appropriations Act.

867 Section 18. Present paragraphs (e) and (f) of subsection  
 868 (10) of section 1009.98, Florida Statutes, are redesignated as  
 869 paragraphs (f) and (g), respectively, and a new paragraph (e) is  
 870 added to that subsection, to read:

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CODING: Words ~~stricken~~ are deletions; words underlined are additions.



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871 1009.98 Stanley G. Tate Florida Prepaid College Program.-  
872 (10) PAYMENTS ON BEHALF OF QUALIFIED BENEFICIARIES.-  
873 (e) Notwithstanding the number of credit hours used by a  
874 state university to assess the amount for registration fees,  
875 tuition, tuition differential, or local fees, the amount paid by  
876 the board to any state university on behalf of a qualified  
877 beneficiary of an advance payment contract purchased before July  
878 1, 2024, may not exceed the number of credit hours taken by that  
879 qualified beneficiary at the state university.

880 Section 19. The provisions of this act creating ss.  
881 1004.6497, 1004.6498, and 1009.894, Florida Statutes, and the  
882 provisions amending ss. 1009.22, 1009.23, 1009.24, 1009.53, and  
883 1009.534(2), Florida Statutes, apply retroactively to July 1,  
884 2017.

885 Section 20. The Division of Law Revision and Information is  
886 directed to substitute the term "Effective Access to Student  
887 Education Grant Program" for "Florida Resident Access Grant  
888 Program" and the term "Effective Access to Student Education  
889 grant" for "Florida resident access grant" wherever those terms  
890 appear in the Florida Statutes.

891 Section 21. This act shall take effect upon becoming a law.

**The Florida Senate**  
**BILL ANALYSIS AND FISCAL IMPACT STATEMENT**

(This document is based on the provisions contained in the legislation as of the latest date listed below.)

---

Prepared By: The Professional Staff of the Committee on Education

---

BILL: CS/SB 88

INTRODUCER: Education Committee; Senator Hukill and others

SUBJECT: High School Graduation Requirements

DATE: October 10, 2017

REVISED: \_\_\_\_\_

	ANALYST	STAFF DIRECTOR	REFERENCE	ACTION
1.	Androff	Graf	ED	Fav/CS
2.			AED	
3.			AP	

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**Please see Section IX. for Additional Information:**

COMMITTEE SUBSTITUTE - Technical Changes

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**I. Summary:**

CS/SB 88 specifies financial literacy standards and instruction for students entering grade 9 in the 2018-2019 school year. Specifically, the bill revises:

- The Next Generation Sunshine State Standards to establish requirements for financial literacy distinct from the existing financial literacy requirements specified under the economics curricular content within the standards for social studies; and
- The requirements for a student to earn a standard high school diploma to:
  - Establish a separate one-half credit requirement in personal financial literacy and specifying related instruction.
  - Reduce the number of required elective credits from eight to seven and one-half.

The bill takes effect July 1, 2018.

**II. Present Situation:**

Florida law requires the adoption of standards for core content of the curricula taught in public schools and specifies the requirements that students must meet to earn a standard high school diploma.<sup>1</sup>

---

<sup>1</sup> Sections 1003.41 and 1003.4282(3)(d), F.S.

## Next Generation Sunshine State Standards

The Next Generation Sunshine State Standards (NGSSS) establish the core content of the curricula to be taught in Florida and specify the core content knowledge and skills that K-12 public school students are expected to acquire prior to graduation.<sup>2</sup> The standards must be rigorous and relevant to incrementally increase a student's core content knowledge and skills over time.<sup>3</sup> The curricular content for each subject must integrate critical-thinking, problem-solving, and workforce literacy skills; communication, reading, and writing skills; mathematics skills; collaboration skills; contextual and applied-learning skills; technology-literacy skills; information and media-literacy skills; and civic-engagement skills.<sup>4</sup> The standards applicable to high school students in grades 9 through 12 may be organized by grade clusters that include more than one grade level, except as otherwise provided for visual performing arts, physical education, health, and foreign language standards.<sup>5</sup>

The State Board of Education (SBE) is responsible for adopting the NGSSS and subsequent revisions to such standards in rule.<sup>6</sup> Currently, the NGSSS must meet the following requirements:<sup>7</sup>

- English Language Arts must establish specific curricular content for, at a minimum, reading, writing, speaking and listening, and language.
- Science standards must establish specific curricular content for, at a minimum, the nature of science, earth and space science, physical science, and life science.
- Mathematics standards must establish curricular content for, at a minimum, algebra, geometry, statistics and probability, number and quantity, functions, and modeling.
- Social Studies standards must establish curricula content for, at a minimum, geography, U.S. and world history, government, civics, humanities, and economics, including financial literacy.
- Visual and performance arts, physical education, health, and foreign language standards must establish specific curricular content and include distinct grade level expectations for the core content knowledge and skills that a student is expected to have acquired by each individual grade level from kindergarten through grade 5. The standards for grades 6 through 12 may be organized by grade clusters of more than one grade level.

## Financial Literacy

Curricular content for financial literacy includes the knowledge, understanding, skills, behaviors, attitudes, and values to enable a student to make responsible and effective financial decisions on a daily basis.<sup>8</sup> Financial literacy instruction must be an integral part of instruction throughout the entire economics course and include information regarding:<sup>9</sup>

- Earning income;

---

<sup>2</sup> Section 1003.41(1), F.S.

<sup>3</sup> Section 1003.41(1), F.S.

<sup>4</sup> *Id.*

<sup>5</sup> *Id.*

<sup>6</sup> *Id.*

<sup>7</sup> Section 1003.41(2), F.S.

<sup>8</sup> Section 1003.41(2)(d), F.S.

<sup>9</sup> *Id.*

- Buying goods and services;
- Saving and financial investing;
- Taxes;
- The use of credit and credit cards;
- Budgeting and debt management, including student loans and secured loans;
- Banking and financial services;
- Planning for one's financial future, including higher education and career planning;
- Credit reports and scores; and
- Fraud and identity theft prevention.

Currently, the Course Code Directory (CCD)<sup>10</sup> lists at least five one-half credit economics with personal financial literacy courses<sup>11</sup> and two separate one-half credit courses in personal financial literacy.<sup>12</sup>

### **Credits Required to Earn a Standard High School Diploma**

To graduate from high school with a standard high school diploma, a student must successfully complete 24 credits, an International Baccalaureate curriculum, or an Advanced International Certificate of Education curriculum.<sup>13</sup>

A student must successfully complete 24 credits in the following subject areas:<sup>14</sup>

- Four credits in English Language Arts (ELA) I, II, III, and IV.
- Four credits in mathematics, including one each in Algebra I and Geometry. Industry certifications earned by students may substitute for up to two mathematics credits, except for Algebra I and Geometry.
- Three credits in science, including one credit in Biology I and two credits in equally rigorous courses.<sup>15</sup> Industry certifications earned by students may substitute for one science credit, except for Biology I.
- Three credits in social studies, including one credit each in U.S. history and world history; one-half in credit in economics, which must include financial literacy; and one-half credit in U.S. Government.
- One credit in fine or performing arts, speech and debate, or practical arts that incorporates artistic content and techniques of creativity, interpretation, and imagination.

<sup>10</sup> The Course Code Directory (CCD) lists all public preK-12 and postsecondary career and technical education courses that are available for use by school districts. Programs and courses that are funded through the Florida Education Finance Program and courses or programs for which students may earn credit toward high school graduation must be listed in the CCD. The CCD maintains course listings for administration and service assignments, K-12 education, exceptional student education, career and technical education, and adult education, with details regarding appropriate teacher certification levels. The CCD provides course information to schools, districts, and the state. Rule 6A-1.09441, F.A.C.

<sup>11</sup> Courses 2102335, 2102340, 2102345, 2102800, and 2102805. Florida Department of Education, *2017-2018 Course Directory Section 3 – Grades 9 to 12 and Adult Education Courses* (2017), available at <http://www.fldoe.org/core/fileparse.php/7746/urlt/1718CCD-Basic9-12.pdf>, at 43-44.

<sup>12</sup> Courses 2102372 and 2102374. Florida Department of Education, *2017-2018 Course Directory Section 3 – Grades 9 to 12 and Adult Education Courses* (2017), available at <http://www.fldoe.org/core/fileparse.php/7746/urlt/1718CCD-Basic9-12.pdf>, at 43.

<sup>13</sup> Section 1003.4282(1)(a), F.S.

<sup>14</sup> Section 1003.4282(3), F.S.

<sup>15</sup> Two of the three science credits must have a laboratory component. Section 1003.4282(3)(c), F.S.

- One credit in physical education that must include the integration of health.
- Eight credits in electives. School districts are required to develop and offer coordinated electives to enable a student to develop knowledge and skills in his or her area of interest and such electives must include opportunities for students to earn college credit.

### III. Effect of Proposed Changes:

CS/SB 88 specifies financial literacy standards and instruction for students entering grade 9 in the 2018-2019 school year. Specifically, the bill revises:

- The Next Generation Sunshine State Standards to establish requirements for financial literacy distinct from the existing financial literacy requirements specified under the economics curricular content within the standards for social studies; and
- The requirements for a student to earn a standard high school diploma to:
  - Establish a separate one-half credit requirement in personal financial literacy.
  - Reduce the number of required elective credits from eight to seven and one-half.

#### Next Generation Sunshine State Standards

The bill clarifies that the current requirements for financial literacy, embedded within the social studies standards, do not apply to students entering grade 9 in the 2018-2019 school year and thereafter. Additionally, the bill revises the Next Generation Sunshine State Standards (NGSSS) to establish requirements for financial literacy distinct from the existing financial literacy requirements specified under the economics curricular content within the standards for social studies, beginning with students entering grade 9 in the 2018-2019 school year. The financial literacy standards must establish specific curricular content that must include, but is not limited to, personal financial literacy and money management. Accordingly, the NGSSS may need to be revised to include an understanding of how to balance a checkbook and the implications of receiving an inheritance.<sup>16</sup> In addition, CPALMS may need to be updated to reflect the financial literacy standards that apply to students entering grade 9 in the 2018-2019 school year.<sup>17</sup> Consequently, modifications to the Course Code Directory may be required to report additional personal financial literacy courses.<sup>18</sup>

#### Credits Required to Earn a Standard High School Diploma

The bill requires that, beginning with students entering grade 9 in the 2018-2019 school year, students must earn one-half credit in personal financial literacy, in addition to the required three social studies credits, in order to receive a standard high school diploma. Currently, students are not required to complete a separate course in financial literacy to graduate from high school with a standard diploma.<sup>19</sup> However, Florida law requires students to earn one-half credit in economics, which must include financial literacy.<sup>20</sup>

<sup>16</sup> Florida Department of Education, *SB 392 Analysis* (2017), at 3. SB 392 (2017) is substantively the same as SB 88 (2018).

<sup>17</sup> CPALMS is the State of Florida's official source for information on standards and course descriptions. CPALMS, *Homepage*, <http://www.cpalms.org/Public/> (last visited October 6, 2017).

<sup>18</sup> Florida Department of Education, *SB 392 Analysis* (2017), at 7.

<sup>19</sup> Florida Department of Education, *SB 392 Analysis* (2017), at 2.

<sup>20</sup> Section 1003.4282(3)(d), F.S.

The bill requires that personal financial literacy instruction include:

- Types of bank accounts offered, opening and managing a bank account, and assessing the quality of a depository institution's services.
- Balancing a checkbook.
- Basic principles of money management, such as spending, credit, credit scores, and managing debt, including retail and credit card debt.
- Completing a loan application.
- Receiving an inheritance and related implications.
- Basic principles of personal insurance policies.
- Computing federal income taxes.
- Local tax assessments.
- Computing interest rates by various mechanisms.
- Simple contracts.
- Contesting an incorrect billing statement.
- Types of savings and investment.
- State and federal laws concerning finance.

The personal financial literacy instruction enumerated in the bill is similar to the financial literacy instruction specified in Florida law (e.g., credit cards, credit scores, taxes, banking, loans and debt management) with some exceptions (i.e., balancing a checkbook, receiving an inheritance and related implications, basic principles of personal insurance policies, simple contracts, and state and federal laws concerning finance).

Additionally, the bill reduces the current elective credits required to earn a standard high school diploma from eight to seven and one-half. As such, the bill maintains the total number of credits (i.e., 24) that students must successfully complete to earn a standard high school diploma.

The bill may increase high school students' personal financial literacy, which may help high school students acquire the knowledge and skills to effectively manage personal finances and plan for pursuing higher education or entering the workforce.

This bill takes effect July 1, 2018.

#### **IV. Constitutional Issues:**

A. Municipality/County Mandates Restrictions:

None.

B. Public Records/Open Meetings Issues:

None.

C. Trust Funds Restrictions:

None.

**V. Fiscal Impact Statement:****A. Tax/Fee Issues:**

None.

**B. Private Sector Impact:**

None.

**C. Government Sector Impact:**

According to the Florida Department of Education (DOE), the implementation of a new course in financial literacy may result in expenses associated with instructional materials and the provision, documentation, and monitoring of professional development for teachers.<sup>21</sup> The DOE projected four cost scenarios for implementing a required financial literacy course. The scenarios are based on a cost analysis that the DOE submitted to the Florida Legislature on October 1, 2013.<sup>22</sup>

- Scenarios one and two assume that teachers who are currently employed by the district are trained to teach the financial literacy course.<sup>23</sup>
  - Scenario one assumes one set of textbooks per classroom, amounting to an estimated implementation cost of \$3,086,512 for the first year and a total cost of \$4,899,568 for the first five years.<sup>24</sup>
  - Scenario two assumes an individual textbook used by each student in the course, amounting to an estimated implementation cost of \$9,440,776 for the first year and a total cost of \$15,021,064 for the first five years.
- Scenario three assumes that financial literacy instruction is taken electronically through an online course, amounting to an estimated implementation cost of \$160,792 for the first year with no additional costs after the first year for teacher training and travel.<sup>25</sup>
- Scenario four assumes that financial literacy instruction is obtained through a free curriculum, amounting to an estimated first year implementation cost of \$140,296, with no additional costs after the first year.<sup>26</sup>

**VI. Technical Deficiencies:**

None.

**VII. Related Issues:**

None.

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<sup>21</sup> Florida Department of Education, *SB 392 Analysis* (2017), at 4. SB 392 (2017) is substantively the same as SB 88 (2018).

<sup>22</sup> Florida Department of Education, *SB 392 Analysis* (2017), at 4; *see* s. 11, ch. 2013-27, L.O.F.

<sup>23</sup> Florida Department of Education, *SB 392 Analysis* (2017), at 4.

<sup>24</sup> *Id.*

<sup>25</sup> *Id.*, at 5.

<sup>26</sup> *Id.*

**VIII. Statutes Affected:**

This bill substantially amends the following sections of the Florida Statutes: 1003.41 and 1003.4282.

**IX. Additional Information:**

- A. **Committee Substitute – Statement of Changes:**  
(Summarizing differences between the Committee Substitute and the prior version of the bill.)

**CS by Education on October 9, 2017:**

The committee substitute clarifies data in the whereas clause in the title to reflect that the adoption of this act will make Florida the sixth state in the nation to require a stand-alone course in personal financial literacy as a prerequisite for high school graduation and a standard high school diploma.

- B. **Amendments:**

None.





859312

LEGISLATIVE ACTION

Senate	.	House
Comm: RCS	.	
10/10/2017	.	
	.	
	.	
	.	

---

The Committee on Education (Hukill) recommended the following:

**Senate Amendment**

In title, delete lines 26 - 27  
and insert:

WHEREAS, Florida is one of 17 states in the nation to  
require financial literacy instruction as a prerequisite for  
high school graduation and a standard high school diploma and  
the adoption of this act will make it the sixth state in the  
nation to require a stand-alone course in personal financial  
literacy as

By Senator Hukill

14-00043-18

201888\_\_

1 A bill to be entitled  
 2 An act relating to high school graduation  
 3 requirements; amending s. 1003.41, F.S.; revising the  
 4 requirements for the Next Generation Sunshine State  
 5 Standards to include financial literacy; amending s.  
 6 1003.4282, F.S.; revising the required credits for a  
 7 standard high school diploma to include one-half  
 8 credit of instruction in personal financial literacy  
 9 and money management and seven and one-half, rather  
 10 than eight, credits in electives; providing an  
 11 effective date.

12

13 WHEREAS, many young people in this state graduate from high  
 14 school without having a basic knowledge of financial literacy  
 15 and money management, and

16 WHEREAS, the Legislature finds that, in light of the recent  
 17 economic challenges nationwide, sound financial management  
 18 skills are vitally important to all Floridians, particularly  
 19 high school students, and

20 WHEREAS, the Legislature also finds that requiring  
 21 educational instruction in financial literacy and money  
 22 management as a prerequisite to high school graduation will  
 23 better prepare young people in this state for adulthood by  
 24 providing them with the requisite knowledge to achieve financial  
 25 stability and independence, and

26 WHEREAS, adoption of this act will make Florida the 18th  
 27 state in the nation to require financial literacy instruction as  
 28 a prerequisite for high school graduation and a standard high  
 29 school diploma, NOW, THEREFORE,

Page 1 of 4

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14-00043-18

201888\_\_

30  
 31 Be It Enacted by the Legislature of the State of Florida:  
 32  
 33 Section 1. Paragraph (d) of subsection (2) of section  
 34 1003.41, Florida Statutes, is amended and paragraph (f) is added  
 35 to that subsection, to read:  
 36 1003.41 Next Generation Sunshine State Standards.—  
 37 (2) Next Generation Sunshine State Standards must meet the  
 38 following requirements:  
 39 (d) Social Studies standards must establish specific  
 40 curricular content for, at a minimum, geography, United States  
 41 and world history, government, civics, humanities, and  
 42 economics, including financial literacy. Financial literacy  
 43 includes the knowledge, understanding, skills, behaviors,  
 44 attitudes, and values that will enable a student to make  
 45 responsible and effective financial decisions on a daily basis.  
 46 Financial literacy instruction shall be an integral part of  
 47 instruction throughout the entire economics course and include  
 48 information regarding earning income; buying goods and services;  
 49 saving and financial investing; taxes; the use of credit and  
 50 credit cards; budgeting and debt management, including student  
 51 loans and secured loans; banking and financial services;  
 52 planning for one's financial future, including higher education  
 53 and career planning; credit reports and scores; and fraud and  
 54 identity theft prevention. The requirements for financial  
 55 literacy specified under this paragraph do not apply to students  
 56 entering grade 9 in the 2018-2019 school year and thereafter.  
 57 (f) Effective for students entering grade 9 in the 2018-  
 58 2019 school year and thereafter, financial literacy standards

Page 2 of 4

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59 must establish specific curricular content for, at a minimum,  
 60 personal financial literacy and money management. Financial  
 61 literacy includes instruction in the areas specified in s.  
 62 1003.4282(3)(h).

63 Section 2. Paragraphs (d) and (g) of subsection (3) of  
 64 section 1003.4282, Florida Statutes, are amended, and paragraph  
 65 (h) is added to that subsection, to read:

66 1003.4282 Requirements for a standard high school diploma.—

67 (3) STANDARD HIGH SCHOOL DIPLOMA; COURSE AND ASSESSMENT  
 68 REQUIREMENTS.—

69 (d) *Three credits in social studies.*—A student must earn  
 70 one credit in United States History; one credit in World  
 71 History; one-half credit in economics, which must include  
 72 financial literacy; and one-half credit in United States  
 73 Government. The United States History EOC assessment constitutes  
 74 30 percent of the student's final course grade. However, for a  
 75 student entering grade 9 in the 2018-2019 school year or  
 76 thereafter, financial literacy is not a required component of  
 77 the one-half credit in economics.

78 (g) ~~Eight Credits in Electives.~~—School districts must  
 79 develop and offer coordinated electives so that a student may  
 80 develop knowledge and skills in his or her area of interest,  
 81 such as electives with a STEM or liberal arts focus. Such  
 82 electives must include opportunities for students to earn  
 83 college credit, including industry-certified career education  
 84 programs or series of career-themed courses that result in  
 85 industry certification or articulate into the award of college  
 86 credit, or career education courses for which there is a  
 87 statewide or local articulation agreement and which lead to

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88 college credit. A student entering grade 9 before the 2018-2019  
 89 school year must earn eight credits in electives. A student  
 90 entering grade 9 in the 2018-2019 school year or thereafter must  
 91 earn seven and one-half credits in electives.

92 (h) One-half credit in personal financial literacy.—  
 93 Beginning with students entering grade 9 in the 2018-2019 school  
 94 year, each student shall earn one-half credit in personal  
 95 financial literacy and money management. This instruction must  
 96 include discussion of or instruction in the following:

97 1. Types of bank accounts offered, opening and managing a  
 98 bank account, and assessing the quality of a depository  
 99 institution's services.

100 2. Balancing a checkbook.

101 3. Basic principles of money management, such as spending,  
 102 credit, credit scores, and managing debt, including retail and  
 103 credit card debt.

104 4. Completing a loan application.

105 5. Receiving an inheritance and related implications.

106 6. Basic principles of personal insurance policies.

107 7. Computing federal income taxes.

108 8. Local tax assessments.

109 9. Computing interest rates by various mechanisms.

110 10. Simple contracts.

111 11. Contesting an incorrect billing statement.

112 12. Types of savings and investments.

113 13. State and federal laws concerning finance.

114 Section 3. This act shall take effect July 1, 2018.

THE FLORIDA SENATE  
**APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

Oct. 9, 17

Meeting Date

SB88

Bill Number (if applicable)

Topic Financial Literacy

Amendment Barcode (if applicable)

Name Joy Ryan

Job Title \_\_\_\_\_

Address 300 S. Duval St.

Phone 425-4000

Street

Tally 32301

City

State

Zip

Email joy@meaganlawfirm.com

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing Nationwide Ins. Co.

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

**This form is part of the public record for this meeting.**

S-001 (10/14/14)

THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10/9/17

Meeting Date

SB88

Bill Number (if applicable)

Topic Financial Literacy

Amendment Barcode (if applicable)

Name Jared Ross

Job Title SVP ~~Government Affairs~~ Gov. Affairs

Address 3692 Coolidge Ct.

Phone (850) 322-6956

Street

Tallahassee FL 32311

City

State

Zip

Email jared.ross@lscu.com

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing FL Credit Union Association

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

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THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10/9/17  
Meeting Date

SB 88  
Bill Number (if applicable)

Topic High School Graduation Requirements

Amendment Barcode (if applicable)

Name Aimee Diaz Lyon

Job Title

Address 119 South Monroe Street  
Street

Phone 850-205-9000

Tallahassee FL 32301  
City State Zip

Email aimee.diazlyon@mhdfirm.com

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing The Business Law Section of the Florida Bar

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

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THE FLORIDA SENATE  
**APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10/9  
Meeting Date

SB 88  
Bill Number (if applicable)

Topic High School Grad Requirements

Amendment Barcode (if applicable)

Name Brewster Bevis

Job Title Senior Vice President

Address 516 W Adams St  
Street

Phone 224-7173

TLH FL 32301  
City State Zip

Email bbevis@arfi.com

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing Associated Industries of Florida

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

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THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10/9/17  
Meeting Date

88  
Bill Number (if applicable)

Topic Financial Literacy

Amendment Barcode (if applicable)

Name Anthony DiMarco

Job Title Exec. V.P. of Govt. Affairs

Address 1001 Thomaston Rd

Phone 774-2265

Tallahassee FL 32305  
City State Zip

Email admarco@richbanks.com

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing Florida Bankers Association

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

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THE FLORIDA SENATE  
**APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10/9/17  
Meeting Date

SB 88  
Bill Number (if applicable)

Topic SB 88

Amendment Barcode (if applicable)

Name Mark Anderson

Job Title \_\_\_\_\_

Address 106 S. Monroe

Phone 813-205-0658

Street

Tallahassee FL

32307

City

State

Zip

Email Mark@ConsultAnderson.com

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing Florida Council on Economic Education

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

This form is part of the public record for this meeting.

S-001 (10/14/14)



# Emergency Coordination of State and Local Entities

Senate Education Committee

October 2017



FLORIDA DEPARTMENT OF  
**EDUCATION**  
fldoe.org

[www.FLDOE.org](http://www.FLDOE.org)

## Emergency Management (EM) Buddies

- EM Buddies assigned for:
  - Superintendents
  - College Presidents
  - Universities
- Staff also communicate with the Divisions of Vocational Rehabilitation and Blind Services about status of local offices

## Communications

- EM Buddies provide the direct communications conduit among:
  - State Emergency Operations Center (SEOC)
  - Superintendents and Presidents
  - County Emergency Operations Centers (EOCs)
  - DOE
- The primary functions of the EM buddies are to:
  - Provide information directly to schools and districts
  - Collect important status information from superintendents/presidents and county EOCs

## **Emergency Phases – Role of EM Buddies**

**Phase 1:** Preparedness for the event and monitoring

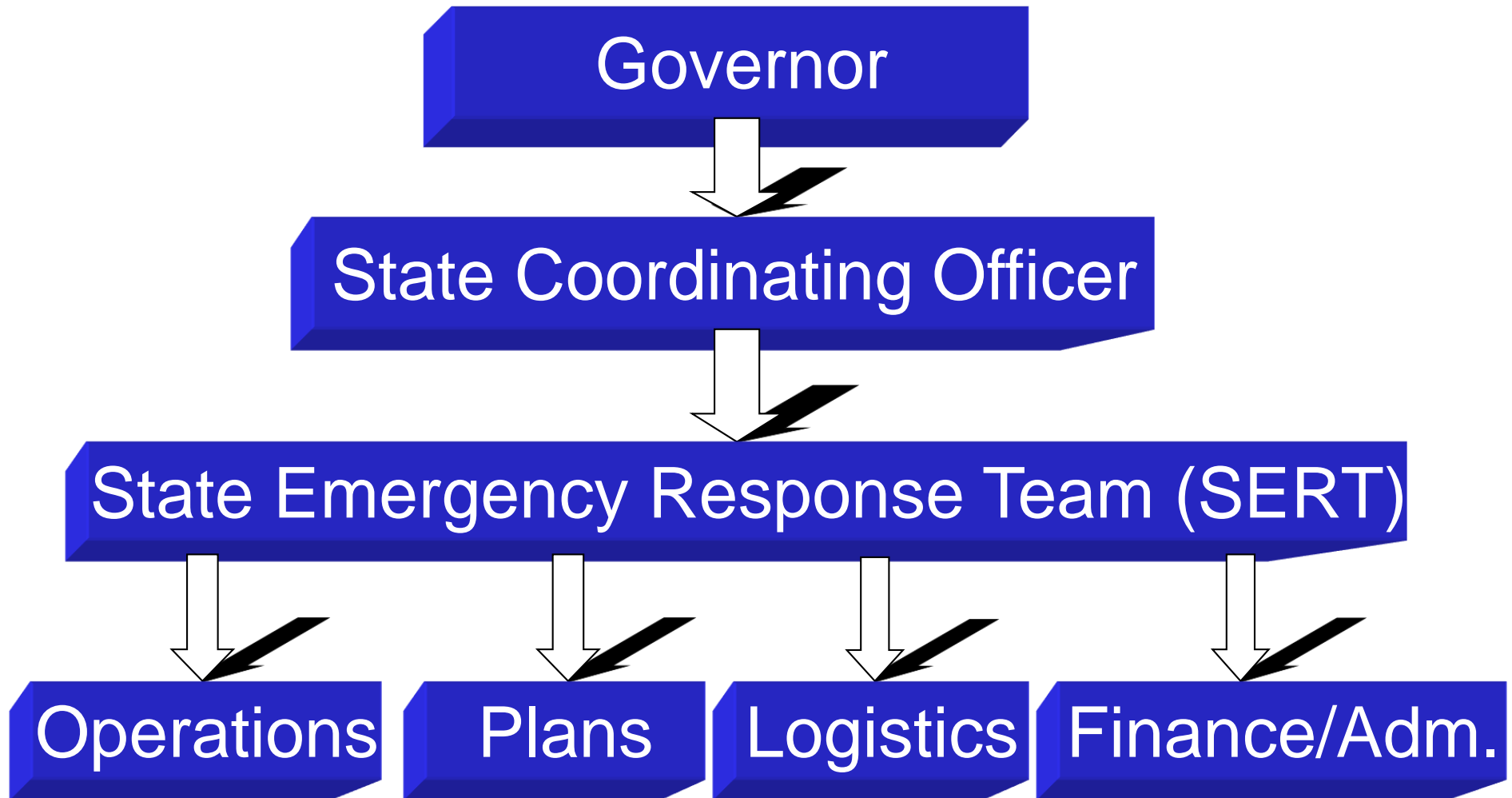
**Phase 2:** Survival of the event

**Phase 3:** Assessment of and recovery from the event

## DOE Coordination

- DOE EM Staff:
  - Transmit instructions and specific requests to EM buddies
  - Receive regular reports from EM buddies
  - Organize information into regular reports for the State Emergency Operations Center (SEOC) on:
    - Shelter status
    - School closings and openings
    - Plans
    - Needs

# State Emergency Operations Center (SEOC)



## SERT Standing Orders – Phase 3

1. Establish communication with areas Impacted
2. Search and rescue /security
3. Meet basic human needs
  1. Medical
  2. Water
  3. Food
  4. Shelter
  5. Emergency fuel
4. Restore critical infrastructure
- 5. Close shelters; open schools, colleges, and local businesses**
6. Begin the recovery



## Roles and Responsibilities

- Districts, schools and colleges work closely with the local EOCs
- Identified needs placed by EOCs as “missions” into the statewide tracker
- SEOC staff work with the local EOCs and partner agencies to take care of the identified missions
- DOE staff work at SEOC to follow up on the missions
- DOE makes SEOC inquiries of districts, schools and colleges through EM buddies

## Hurricane Irma

- As of Monday, October 2, all schools and colleges in Florida were open, with the great majority opening on or before September 18.
- The department helped to coordinate identification of districts needing assistance with restoration of power.

## Department Actions and Guidance

- Facilitated calls between superintendents and college presidents with the Governor prior to landfall.
- Activated the EM buddies for the entire state.
- Established a DOE website page for information about school and college closings and openings.
- Prepared twice daily reports compiling the information from the districts, schools, colleges and local offices (shelters, needs, closings and openings, etc.)

## Department Actions and Guidance

- Provided guidance to school districts regarding instructional hours
- Provided revised assessment retake schedules
- Shared information from the Department of Revenue regarding compliance with TRIM requirements
- Shared information from USED about available federal assistance and how to access it
- Shared messages from SEOC and the Governor's Office with districts, schools and colleges



[www.FLDOE.org](http://www.FLDOE.org)



**THE FLORIDA SENATE**  
**APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

✓  
Doe

10/9/17

*Meeting Date*

N/A

*Bill Number (if applicable)*

N/A

Topic Emergency Coordination Efforts of State and Local Entities

*Amendment Barcode (if applicable)*

Name Pam Stewart

Job Title Commissioner

Address 325 W. Gaines Street

Phone 850-245-9633

*Street*

Tallahassee

FL

32399

Email Pam.Stewart@fldoe.org

*City*

*State*

*Zip*

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
*(The Chair will read this information into the record.)*

Representing Department of Education

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

*While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.*

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S-001 (10/14/14)

THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)



10/19/17  
Meeting Date

DOE  
Bill Number (if applicable)

Topic Homework Issues

Amendment Barcode (if applicable)

Name Joy Frank

Job Title Legislative Grants / General Counsel

Address 208 S. Munn  
Street

Phone 858-577-5784

Tallah FL 32301  
City State Zip

Email joyfrank@fldoe.org

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing FL Assoc. of District School Superintendents

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

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THE FLORIDA SENATE

APPEARANCE RECORD

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

Meeting Date

DOE  
Bill Number (if applicable)

Topic Hurricane Response

Amendment Barcode (if applicable)

Name Spencer Fylant

Job Title Communications + Gov't Relations Liaison

Address 7227 Land O' Lakes Blvd Phone 813-794-2259

Street

Land O' Lakes FL 34638 Email spylant@pasco.k12.fl.us

City

State

Zip

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing Pasco County Schools

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

While it is a Senate tradition to encourage public testimony, time may not permit all persons wishing to speak to be heard at this meeting. Those who do speak may be asked to limit their remarks so that as many persons as possible can be heard.

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THE FLORIDA SENATE  
**APPEARANCE RECORD**

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

10/9/2017  
Meeting Date

SUS  
Presentation  
Bill Number (if applicable)

Topic University Action during Truma

Amendment Barcode (if applicable)

Name Marshall Cuiser

Job Title Chancellor - SUS

Address 325 W. GARNER Street

Phone 904 688-0350

Jalokummi FL 32399  
City State Zip

Email marshall.cuiser@flbog.edu

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing SUS

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

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# BOARD *of* GOVERNORS

## State University System of Florida

### Hurricane Irma Response Presentation to the Senate Committee on Education

Marshall M. Criser III, Chancellor  
October 9, 2017



# State University System Emergency Program

## Board Regulation 3.001 Campus Emergency Management

- Requires each university to have:
  - A Comprehensive Emergency Management Plan (CEMP), which includes preparing for, mitigating, responding and recovering from emergencies.
  - Continuity of Operations Plan(s) (COOP).
  - An Emergency Management Contact and alternate.
- Requires the Chancellor to designate an Emergency Coordination Officer (ECO) and alternate.
- Requires a communications protocol that provides for State University System-level emergency notification, response and coordination of effort. Requires ECO coordination with the State Emergency Response Team (SERT).
- The Chancellor and the ECO remain in regular communications with university leadership including presidents, vice-presidents, police chiefs, emergency managers on a regular basis. Communication is increased during an emergency incident.



# Hurricane Irma – University Preparation and Response

## Universities' Response to Emergency

- The size and scope of Irma was such that all 12 universities implemented their Emergency Operations Plans.
- The universities came through Irma in generally good condition.
- This was a result of:
  - 1) Planning, mitigation and preparation, and
  - 2) The specific track of Hurricane Irma.
- Each school has implemented plans to address instructional days missed.



# Hurricane Irma – University Closures

## Classes Cancelled

	9/6	9/7	9/8		9/11	9/12	9/13	9/14	9/15		9/18	9/19
Florida Agricultural and Mechanical University			X		X	X	X	X	X			
Florida Atlantic University	X	X	X		X	X	X	X	X			
Florida Gulf Coast University		X	X		X	X	X	X	X		X	X
Florida International University	X	X	X		X	X	X	X	X			
Florida Polytechnic University	X	X	X		X	X	X	X	X			
Florida State University			X		X	X	X	X	X			
New College of Florida		X	X		X	X	X	X	X			
University of Central Florida			X		X	X	X					
University of Florida			X		X	X	X					
University of North Florida			X		X	X	X					
University of South Florida		X	X		X	X	X					
University of West Florida			X		X							



# Hurricane Irma – University Response and Assistance Provided

University	Response
Florida Agricultural & Mechanical University (FAMU)	FAMU housed and fed members of the Army National Guard, and offered parking facilities as a shelter of last resort. Foster Tanner Rehearsal Hall was opened to house and feed campus students.
Florida Atlantic University (FAU)	FAU offered multiple parking facilities as shelters of last resort, and provided staging areas for utility crews.
Florida Gulf Coast University (FGCU)	FGCU's Alico Stadium operated as a general population shelter before, during and after the storm. The Lutgert Building housed evacuees from an assisted living facility in Charlotte County.
Florida International University (FIU)	FIU provided both a special needs and general population shelter for evacuees from Monroe County and provided housing to 52 public health officials. FIU is still sheltering special needs (dialysis patients) from the US Virgin Islands, mostly St. Thomas, who were evacuated to Puerto Rico and had to evacuate a second time. All parking garages were made available to the FIU community and the surrounding community to park their cars ahead of the storm.
Florida Polytechnic University (FPU)	The university sheltered approximately 170 students on campus.
Florida State University (FSU)	Students and staff volunteers worked with the Red Cross to put together care packages for storm victims. Provided space for 200 staff from the Federal Emergency Management Agency and others to get disaster relief to Hurricane Irma victims in Florida. The site served as a main staging area, from which staff were eventually deployed as needed.



# Hurricane Irma – University Response and Assistance Provided (continued)

University	Response
New College of Florida	New College offered food service assistance to the Red Cross and allowed Sudakoff as a shelter of last resort.
University of Central Florida (UCF)	UCF hosted 1600+ students on campus locations, hosted the FL and GA National Guard (over 700 troops and hundreds of vehicles) for several days at the stadium, hosted leaders from Lockheed Martin to help with Hurricane response planning, hosted the Orlando Federal Air Marshalls at the UCF EOC post storm, worked with Lockheed Martin and the City of Orlando Emergency Management to get send relief supplies on a C-130 cargo plane to Puerto Rico.
University of Florida (UF)	UF opened a shelter at Steinbrenner Band Hall, and provided an additional emergency shelter inside the Southwest Recreation Center (Building 0316), for the UF community and the general population.
University of North Florida (UNF)	UNF provided staging areas for police waiting to respond to the storm.
University of South Florida	USF opened the Sun Dome as a shelter, and Pizzo Elementary (located on campus) served as a general population shelter.
University of West Florida (UWF)	UWF offered a staging area for utility personnel. Approximately 90 UWF students assisted at the Red Cross Host Shelter located in Pensacola.



# State University System Coordination

## Statewide Coordination and Response

- Board of Governors office staff worked at the SUS desk in the Emergency Operations Center (EOC). Staff worked with the Army National Guard and State Emergency Response Team (SERT) staff to meet identified needs for shelter space; first responder housing/staging; medical response; and line crew placement.
- Coordinated communication with state SERT regarding use of university facilities and resources available to assist.
- Provided information to the Board of Governors, Florida College System Office, Department of Education and the Governors Office regarding the universities.
- Students and staff across the university system volunteered their time for shelter staffing and clean-up/debris removal.





# Lessons Learned

- The State University System is a strong asset to the State of Florida.
- A university work group will be created to assess how we can further improve our response to assist the citizens of the State.
- The university utility infrastructure is aging, and would be vulnerable to the type of direct impact event of a Maria or a Harvey. Damage to the grid with potential recovery taking longer than two weeks is possible.
- The SUS is developing a utility infrastructure mitigation plan, and will provide cost estimates prior to the 2018 Legislative Session.



# BOARD *of* GOVERNORS

## State University System of Florida

*[www.flbog.edu](http://www.flbog.edu)*

THE FLORIDA SENATE  
**APPEARANCE RECORD**

SUS  
Presentation  
Bill Number (if applicable)

10/9/2017  
Meeting Date (Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

Topic University Action during Truma

Amendment Barcode (if applicable)

Name Marshall Cruiser

Job Title Chancellor - SUS

Address 325 W. GARNER Street

Phone 904 688-0350

Jallahanne FL 32399  
City State Zip

Email marshall.cruiser@flbog.edu

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing SUS

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

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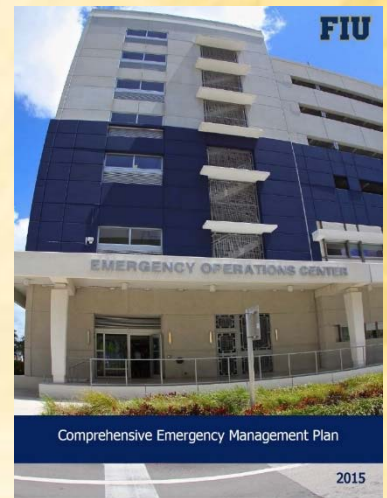
This form is part of the public record for this meeting.

# FIU Emergency Response to Hurricanes Irma and Maria



Presentation to the Senate Committee on Education

Kenneth A. Jessell, MBA, Ph.D.  
Senior Vice President and Chief Financial Officer  
October 9, 2017



FIU is *Storm* Ready

FIU Provides  
Shelter for Monroe  
County Special  
Needs Residents  
through Formal  
MOU



# Special Needs





# FIU Coordinates with Monroe County Department of Health to Shelter 120 Special Needs Residents Beginning September 7



As Requested by Governor Rick Scott, FIU Makes Available Additional Shelter Space for 500 Monroe County General Population Residents on September 7; Coordination with American Red Cross





FIU Coordinates with Lieutenant Governor López-Cantera, Monroe County Sheriff's Department & Fire Rescue, & Miami-Dade Police Department to Assist in the Safety and Security of Evacuees





## FIU Provides Shelter for 432 FIU Students, 29 Housing Staff, and 22 Displaced Students from St. Thomas University



## U.S. Secretary of Labor Acosta, Florida Senator Braynon and Florida Representative Nuñez Visit Special Needs Shelter





# FIU Shelters 51 Medical Staff from U.S. Public Health Services along with 17 U.S. Treasury Security Officers; Health and Human Services Secretary Price Visits with the Responders



# FIU Shelters 90 Dialysis Patients from U. S. Virgin Islands





# Governor Scott and Costa Rica President Solis Visit Dialysis Patients



# FIU Faculty and Staff Keep Spirits High





# Helping Hands



# Hurricane Symposium – *Lessons Learned*

FLORIDA INTERNATIONAL UNIVERSITY

save  
the date

2017  
HURRICANE  
SEASON  
SYMPOSIUM

Friday, December 1, 2017  
10:00 a.m. - 1:00 p.m.

Student Academic Success Center  
Auditorium Room 160  
Modesto A. Maidique Campus (MMC)  
11200 S.W. 8th Street | Miami, FL 33199

The purpose of the 2017 Hurricane Season Symposium is to discuss lessons learned with top officials in an ongoing effort to improve hurricane preparedness, response, recovery and mitigation efforts to save lives, reduce human suffering, lessen property damage and minimize environmental impacts. This Symposium will provide a forum for federal, state, and local officials as well as the private sector to exchange ideas and offer best practices to improve all phases of emergency management in Florida and nationwide.

**Speakers invited:**

William B. "Brock" Long  
*FEMA Administrator*

Robert David Paulison  
*Former FEMA Administrator*

Dr. Edward Rappaport  
*National Hurricane Center Acting Director*

Bryan Koon  
*Former Florida Division of Emergency Management Director*

Martin (Marty) Senterfitt  
*Monroe County Emergency Management Director*

and more!

**FIU** | Emergency  
Management



THE FLORIDA SENATE  
**APPEARANCE RECORD**

*FILED*  
*2/10*

10-9-2017

(Deliver BOTH copies of this form to the Senator or Senate Professional Staff conducting the meeting)

Meeting Date

Bill Number (if applicable)

Topic Emergency Coordination Efforts of State/Local Entities

Amendment Barcode (if applicable)

Name Kenneth Jessell

Job Title Vice President & CFO, Florida International Univ

Address 11200 SW 8th Street

Phone 305-348-2101

Street  
Miami  
City

FL  
State

33199  
Zip

Email kjessell@fiu.edu

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing State University System, Board of Governors

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

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S-001 (10/14/14)

✓

**THE FLORIDA SENATE**  
**APPEARANCE RECORD**

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10/9/17  
Meeting Date

\_\_\_\_\_  
Bill Number (if applicable)

Topic FIU Presentation

\_\_\_\_\_  
Amendment Barcode (if applicable)

Name Roman Gastesi

Job Title County Administrator Monroe County

Address 1100 Simonton St. Suite 2-205

Phone (305) 292-4441

Street

Key West  
City

FL  
State

33040  
Zip

Email gastesi-roman@monroecounty-fl.gov

Speaking:  For  Against  Information

Waive Speaking:  In Support  Against  
(The Chair will read this information into the record.)

Representing Monroe County

Appearing at request of Chair:  Yes  No

Lobbyist registered with Legislature:  Yes  No

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S-001 (10/14/14)



## THE FLORIDA SENATE

Tallahassee, Florida 32399-1100

**COMMITTEES:**  
Community Affairs, *Chair*  
Appropriations Subcommittee on Higher  
Education  
Appropriations Subcommittee on Pre-K - 12  
Education  
Education  
Ethics and Elections  
Rules

**SENATOR TOM LEE**  
20th District

October 3, 2017

The Honorable Dorothy Hukill, Chair  
The Florida Senate  
406 Senate Office Building  
404 South Monroe Street  
Tallahassee, FL 32399

Dear Senator Hukill:

I respectfully request to be excused from Monday's meeting of the Education Committee due to a previous commitment in Orlando.

Sincerely,

A handwritten signature in black ink that reads "Tom Lee".

Tom Lee  
Florida State Senator  
20th District

**REPLY TO:**

- 915 Oakfield Drive, Suite D, Brandon, Florida 33511 (813) 653-7061
- 418 Senate Office Building, 404 South Monroe Street, Tallahassee, Florida 32399-1100 (850) 487-5020

Senate's Website: [www.flsenate.gov](http://www.flsenate.gov)

**JOE NEGRON**  
President of the Senate

**ANITERE FLORES**  
President Pro Tempore



## THE FLORIDA SENATE

Tallahassee, Florida 32399-1100

**SENATOR DEBBIE MAYFIELD**  
17th District

October 6, 2017

Chair Dorothy Hukill  
406 Senate Office Building  
404 South Monroe Street  
Tallahassee, FL 32399-1100

Re: Education

Dear Chair Hukill,

I am respectfully requesting an excused absence from the Education committee meeting on October 9, 2017, scheduled from 1:00am to 3:00pm.

I appreciate your consideration of this request and I look forward to working with you and the Education committee in the future. If you have any questions or concerns, please do not hesitate to call me directly.

Thank you,

A handwritten signature in cursive script, appearing to read "Debby".

Senator Debbie Mayfield  
District 17

Cc: Shruti Graff, Laura Zaugg, Lindsey Swindle, Angelique Rinaldi, Edith Little

REPLY TO:

- 900 E. Strawbridge Avenue, Melbourne, Florida 32901 (321) 409-2025
- 1801 27th Street, Vero Beach, Florida 32960 (772) 226-1970
- 324 Senate Office Building, 404 South Monroe Street, Tallahassee, Florida 32399-1100 (850) 487-5017

Senate's Website: [www.flsenate.gov](http://www.flsenate.gov)

JOE NEGRON  
President of the Senate

ANITERE FLORES  
President Pro Tempore

**COMMITTEES:**

Education, Vice Chair  
Government Oversight & Accountability, Vice Chair  
Appropriations Subcommittee on the  
Environment and Natural Resources  
Appropriations subcommittee on General  
Government  
Agriculture  
Judiciary

**JOINT COMMITTEES:**

Joint Legislative Auditing Committee,  
Alternating Chair

# CourtSmart Tag Report

Room: KN 412

Case No.:

Type:

Caption: Senate Education Committee Judge:

Started: 10/9/2017 3:30:26 PM

Ends: 10/9/2017 5:13:25 PM Length: 01:43:00

3:30:24 PM Meeting called to order by Chair Hukill  
3:30:30 PM Roll call by Administrative Assistant, Laureen Zaugg  
3:30:39 PM Quorum Present  
3:31:02 PM Vice Chair Mayfield and Senator Lee excused  
3:31:33 PM Pledge of Allegiance  
3:31:36 PM Comments from Chair Hukill  
3:32:18 PM Warm welcome to new committee members, Senators Book and Perry  
3:32:32 PM Comments from Senator Book  
3:32:47 PM Comments from Senator Perry  
3:33:16 PM Introduction of new committee staff members, Laureen Zaugg, Committee Administrative Assistant and Yale Olenick, Staff Attorney  
3:33:40 PM Introduction of Tab 1, SB 4, Higher Education by Senator Galvano  
3:33:52 PM Explanation of Bill by Senator Galvano  
3:38:52 PM Comments from Chair Hukill  
3:38:57 PM Comments/questions from Senator Thurston  
3:39:24 PM Response from Senator Galvano  
3:40:09 PM Follow-up question from Senator Thurston  
3:40:25 PM Response from Senator Galvano  
3:40:55 PM Additional question from Senator Thurston  
3:41:05 PM Response from Senator Galvano  
3:42:15 PM Follow-up question from Senator Thurston  
3:42:31 PM Response from Senator Galvano  
3:43:41 PM Follow-up question from Senator Thurston  
3:43:55 PM Response from Senator Galvano  
3:44:39 PM Follow-up question from Senator Thurston  
3:45:02 PM Response from Senator Galvano  
3:46:27 PM Question from Senator Simmons  
3:48:26 PM Response from Senator Galvano  
3:49:32 PM Question from Senator Simmons  
3:49:40 PM Response from Senator Galvano  
3:50:36 PM Comments from Chair Hukill  
3:51:02 PM Senator Thurston in debate  
3:54:02 PM Senator Stewart in debate  
3:55:04 PM Closure on SB 4 by Senator Galvano  
3:56:23 PM Roll call on SB 4 by Administrative Assistant, Laureen Zaugg  
3:57:22 PM SB 4 reported favorably  
3:57:50 PM Gavel passed to Senator Simpson  
3:57:59 PM Introduction of SB 88, High School Graduation Requirements by Chair Simpson  
3:58:14 PM Explanation of SB 88 by Senator Hukill  
4:00:04 PM Introduction of Amendment Barcode #859312  
4:00:11 PM Explanation of Amendment Barcode # 859312 by Senator Hukill  
4:00:45 PM Comments from Chair Simpson

**4:00:56 PM** Amendment Barcode #859312 adopted  
**4:01:07 PM** Mark Anderson, Florida Council on Economic Education waives in support  
**4:01:14 PM** Anthony DiMarco, Executive Vice President of Governmental Affairs, Florida Bankers Association waives in support  
**4:01:25 PM** Brewster Bevis, Senior Vice President, Associated Industries of Florida waives in support  
**4:01:30 PM** Aimee Diaz Lyon, The Business Law Section of the Florida Bar waives in support  
**4:01:35 PM** Jared Ross, Senior Vice President, Florida Credit Union Association waives in support  
**4:01:41 PM** Joy Ryan, Nationwide Insurance Company waives in support  
**4:01:53 PM** Closure waived b Senator Hukill  
**4:01:56 PM** Roll call on CS/SB 88 by Administrative Assistant Lauren Zaugg  
**4:02:09 PM** CS/SB 88 reported favorably  
**4:02:31 PM** Gavel returned to Chair Hukill  
**4:02:50 PM** Introduction of speaker Pam Stewart, Commissioner, Department of Education  
**4:18:22 PM** Comments from Chair Hukill  
**4:18:32 PM** Question from Senator Thurston  
**4:18:37 PM** Response from Commissioner Stewart  
**4:19:08 PM** Follow-up question from Senator Thurston  
**4:19:16 PM** Response from Commissioner Stewart  
**4:19:47 PM** Additional question from Senator Thurston  
**4:19:56 PM** Response from Commissioner Stewart  
**4:20:29 PM** Question from Chair Hukill  
**4:20:40 PM** Response from Commissioner Stewart  
**4:21:05 PM** Additional question from Chair Hukill  
**4:21:15 PM** Response from Commissioner Stewart  
**4:22:31 PM** Additional question from Chair Hukill  
**4:22:40 PM** Response from Commissioner Stewart  
**4:23:42 PM** Follow-up question from Chair Hukill  
**4:23:57 PM** Response from Commissioner Stewart  
**4:25:25 PM** Question from Chair Hukill  
**4:25:30 PM** Response from Commissioner Stewart  
**4:26:22 PM** Additional question from Chair Hukill  
**4:26:31 PM** Response from Commissioner Stewart  
**4:26:53 PM** Follow-up question from Chair Hukill  
**4:27:01 PM** Response from Commissioner Stewart  
**4:27:29 PM** Question from Senator Stewart  
**4:27:38 PM** Response from Commissioner Stewart  
**4:28:48 PM** Question from Senator Thurston  
**4:28:56 PM** Response from Commissioner Stewart  
**4:29:52 PM** Question from Senator Farmer  
**4:30:04 PM** Response from Commissioner Stewart  
**4:31:17 PM** Follow-up question from Senator Farmer  
**4:31:25 PM** Response from Commissioner Stewart  
**4:31:47 PM** Question from Chair Hukill  
**4:31:54 PM** Response from Commissioner Stewart  
**4:33:07 PM** Comments/question from Chair Hukill  
**4:33:30 PM** Response from Commissioner Stewart  
**4:33:56 PM** Question from Senator Perry  
**4:34:11 PM** Response from Commissioner Stewart  
**4:34:19 PM** Question from Senator Farmer  
**4:34:24 PM** Response from Commissioner Stewart  
**4:34:46 PM** Question from Senator Stewart

**4:34:51 PM** Response from Commissioner Stewart  
**4:36:08 PM** Follow-up question from Senator Stewart  
**4:36:16 PM** Response from Commissioner Stewart  
**4:36:37 PM** Additional question from Senator Stewart  
**4:36:47 PM** Response from Commissioner Stewart  
**4:37:40 PM** Comments from Chair Hukill  
**4:37:51 PM** Speaker Joy Frank, Legislative Liaison/General Counsel, Florida Association of District School Superintendents  
**4:45:19 PM** Question from Senator Book  
**4:45:24 PM** Response from Ms. Frank  
**4:46:32 PM** Question from Senator Farmer  
**4:46:41 PM** Response from Ms. Frank  
**4:47:16 PM** Speaker Spencer Pylant, Communications & Governmental Relations Liaison, Pasco County Schools  
**4:51:01 PM** Speaker Marshall Criser, Chancellor, State University System  
**4:58:13 PM** Speaker Kenneth Jessell, Vice President & CFO, Florida International University  
**5:10:54 PM** Speaker Ramon Gasles, County Administrator, Monroe County  
**5:11:57 PM** Comments from Chair Hukill  
**5:12:04 PM** Comments from Senator Perry  
**5:12:57 PM** Senator Farmer shown voting favorably for SB 4 and CS/SB 88  
**5:13:08 PM** Senator Stewart moves to adjourn