

The Florida Senate
COMMITTEE MEETING EXPANDED AGENDA
APPROPRIATIONS SUBCOMMITTEE ON EDUCATION
Senator Gaetz, Chair
Senator Montford, Vice Chair

MEETING DATE: Wednesday, January 7, 2015

TIME: 10:00 a.m.—12:00 noon

PLACE: Pat Thomas Committee Room, 412 Knott Building

MEMBERS: Senator Gaetz, Chair; Senator Montford, Vice Chair; Senators Bullard, Galvano, Legg, Ring, Simmons, and Stargel

TAB	BILL NO. and INTRODUCER	BILL DESCRIPTION and SENATE COMMITTEE ACTIONS	COMMITTEE ACTION
	Introductions of Members and Staff		Presented
1	Update on Federal, State, and School Board K-12 Assessment Requirements, Purposes, and Activities		Presented
2	State University System Performance Funding Update		Presented
Other Related Meeting Documents			



Assessment Requirements
Senate Education Appropriations Committee
January 7, 2015

Commissioner Pam Stewart



FLORIDA DEPARTMENT OF
EDUCATION
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Purpose and Value of Assessment

- Section 1008.22(1), F.S, provides that the statewide standardized assessment program is designed to:
 - Assess the achievement level and annual learning gains of each student in English Language Arts and mathematics based on Florida Standards and the achievement level in all other subjects assessed
 - Identify the educational strengths and needs of students and the readiness of students to be promoted to the next grade level or to graduate from high school
 - Provide data for making decisions regarding school accountability, recognition, and improvement of operations and management
 - Assess how well educational goals and curricular standards are met at the school, district, state, national, and international levels
 - Provide information to aid in the evaluation and development of educational programs and policies

Required Statewide Standardized Assessments

- State law requires **mandatory participation** in the statewide standardized assessment program
- The statewide standardized assessment program must be aligned to the state content standards and administered in the following subjects and grade levels
 - English Language Arts (ELA) Grades 3-11
 - Mathematics Grades 3-8
 - Science Grades 5 and 8
 - End-of-Course (EOC) assessments in Algebra I, Geometry, Algebra II, Biology I, U.S. History, and Civics
- State law also provides for the Florida Alternate Assessment (FAA) to be administered to students with disabilities for whom the IEP team has determined is the most appropriate
- The statewide standardized assessments also satisfy federal law requiring assessments in English language arts, mathematics, and science

Exemption

- The State Board of Education adopted the rule for exemptions for students with medical complexities at its November 2014 meeting. Rule 6A-1.0943, F.A.C., is available online at <https://www.flrules.org/gateway/ruleNo.asp?id=6A-1.0943>

State Required Uses of the Statewide Standardized Assessment Results

Students

- A student must earn a Level 2 (out of 5) on the Grade 3 ELA assessment to be promoted to Grade 4
 - Six good cause exemptions are provided by law
- A student must pass the Grade 10 ELA assessment to graduate from high school with a standard diploma
 - Requirement is satisfied by earning a concordant score on SAT or ACT
- A student must pass the Algebra 1 EOC to graduate from high school with a standard diploma
 - Requirement is satisfied by earning a comparative score on PERT
- A student enrolled in a course with a statewide standardized EOC must take the assessment, and the results must count as 30% of the student's course grade
- A student that does not meet the specific levels of performance on the assessment must be provided with additional diagnostic assessments and must participate in progress monitoring throughout the year

State Required Uses of the Statewide Standardized Assessment Results

Schools and Districts

- The achievement and learning gains of students on the statewide, standardized assessments are used to determine school grades, district grades, and school improvement ratings for alternative schools
- Schools identified as schools in need of improvement based on student performance must provide progress monitoring

Teachers

- For teachers teaching courses associated with the statewide, standardized assessments, the results are used to measure student learning growth and included in the “performance of students” portion of the teacher’s evaluation

Other Required Statewide Assessments

- **Florida Kindergarten Readiness Screener (FLKRS)** per s. 1002.69, F.S., is required for all kindergarten students within the first 30 days of the school year to determine readiness and the performance of VPK providers
- **Comprehensive English Language Learning Assessment (CELLA)** per s. 1003.56, F.S., to measure the English language acquisition of English Language Learners
 - Satisfies a federal requirement
- **National Assessment of Educational Progress (NAEP)** per s. 1008.22 (2), F.S., administered to a sample of students in selected grade levels every other year; provides national and state comparisons
 - Satisfies a federal requirement
- **Postsecondary Education Readiness Test (PERT)** per s. 1008.30, F.S., is required of selected 11th graders to determine college and career readiness and 12th grade course placement
- **Preliminary SAT (PSAT) or Preliminary ACT (PLAN)** per s. 1007.35, F.S., is required by state law to be administered by each public high school to all 10th grade students, though the parent has the opportunity to exempt his/her child from PSAT or PLAN

Locally-Determined, Required Assessments

- Section 1008.22(6), F.S., requires each district to administer a district-selected local assessment for each course not assessed under the statewide assessment program, measuring student mastery of course content at the necessary level of rigor for the course
- Districts may choose local assessments from any of the following:
 - Statewide assessment
 - Other standardized assessments, including nationally recognized standardized assessments
 - Industry certification assessments
 - District-developed or district-selected end-of-course assessments
 - Teacher-selected or principal-selected assessments

Assessment Investigation

The Commissioner is conducting an investigation of all standardized assessments used in school districts. The inspection will include:

- What student decisions are based on test results (such as promotion, course grade, progress monitoring; includes additional district uses of statewide standardized tests)
- Reason why students are required to take the test
- Grade levels or groups of students that take the test
- Whether test information is provided to teachers and/or students
- How much time is given for the test
- How often is the test is given and in what format (computer or paper)



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Senate Appropriations Subcommittee on
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Performance Based Funding & Preeminent
Tuition Differential

January 7, 2015
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Board of Governors Performance Funding Model for 2014-15

4 Guiding Principles:

- Use metrics that align with Strategic Plan goals
- Reward excellence or improvement
- Have a few clear, simple metrics
- Acknowledge the unique mission of the different institutions

Key Components:

- New funds allocated based on 10 metrics
- Base funds, equaling new funds, at risk
- One metric chosen by the Board of Governors and one by the Board of Trustees
- Institutions evaluated on the excellence or improvement for each metric
- Data based on one year



Performance Funding Model - Metrics

Points	EXCELLENCE (Achieving System Goals)					IMPROVEMENT (Recognizing Annual Improvement)				
	5	4	3	2	1	5	4	3	2	1
1 Percent of Bachelor's Graduates Employed and/or Continuing their Education Further 1 Yr after Graduation	75%	70%	65%	60%	55%	5%	4%	3%	2%	1%
2 Median Average Full-time Wages of Undergraduates Employed in Florida 1 Yr after Graduation	\$40,000	\$35,000	\$30,000	\$25,000	\$20,000	5%	4%	3%	2%	1%
3 Average Cost per Undergraduate Degree to the Institution	\$20,000	\$22,500	\$25,000	\$27,500	\$30,000	5%	4%	3%	2%	1%
4 Six Year Graduation Rate <i>Full-time and Part-time FTIC</i>	70%	67.5%	65%	62.5%	60%	5%	4%	3%	2%	1%
5 Academic Progress Rate <i>2nd Year Retention with GPA Above 2.0</i>	90%	87.5%	85%	82.5%	80%	5%	4%	3%	2%	1%
6 Bachelor's Degrees Awarded in Areas of Strategic Emphasis <i>(includes STEM)</i>	50%	45%	40%	35%	30%	5%	4%	3%	2%	1%
7 University Access Rate <i>Percent of Undergraduates with a Pell-grant</i>	30%	27.5%	25%	22.5%	20%	5%	4%	3%	2%	1%
8 Graduate Degrees Awarded in Areas of Strategic Emphasis <i>(includes STEM)</i>	50%	45%	40%	35%	30%	5%	4%	3%	2%	1%
Institution-Specific Metrics										
9 Board of Governors choice	Varies by metric					Varies by metric				
10 Board of Trustees choice	Varies by metric					Varies by metric				



2014-2015 Performance Funding Allocation - \$200 M

Universities 26 points or higher	Total Funding Allocation
FAMU	\$10,844,591
FGCU	\$8,110,033
FIU	\$25,277,176
FSU	\$31,742,394
UCF	\$30,833,543
UF	\$39,759,283
UNF	\$10,292,796
USF	\$31,277,827
Total	\$188,137,642

Universities below 26 points	Total Base Funds at Risk
FAU	\$6,952,393
NCF	\$1,080,377
UWF	\$3,829,588
Total	\$11,862,358



University Response

Among all universities:

- ✓ **30+** new advisors to focus on student retention and graduation, offering mentoring, tutoring and other services.
- ✓ **4** revamped career services centers with a focus on student advising and establishing partnerships with local businesses.

- ✓ **120+** additional faculty in high-wage, high-need areas.
- ✓ **3** universities invested in software to target struggling students and improve graduation and retention rates.



Board Approved Changes to 6 Metrics

Metric 1 - % of Bachelor Graduates Employed/ Continuing their Education

- Include employment data from outside Florida and adjust benchmark to reflect updated data

Metric 3 - Average Cost per UG Degree

- Adjust the Cost-per-Degree to reflect higher expenditures and adjust benchmark to reflect updated data

Metric 6 - Bachelor Degrees in Strategic Emphasis

- Align bachelor degrees to reflect the Board's approved list of strategic emphasis programs

Metric 7 - University Access Rate

- Exclude non-U.S. students since they are not eligible for Pell Grants

Metric 8a - Graduate Degrees in Strategic Emphasis

- Align graduate degrees to reflect the Board's approved list of strategic emphasis programs and adjust benchmark to reflect amended *Strategic Plan*

Metric 9 - Board Choice Metric for NCF

- Include additional national rankings



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House Bill 851

House Bill 851, passed during the 2014 Legislative Session, modified Section 1009.24(16) to reduce the tuition differential increase from 15 percent to 6 percent. Only a university that "is designated as a preeminent state research university by the Board of Governors pursuant to section 1001.7065" is eligible for future increases. The following language was included on eligibility criteria:

The tuition differential may be increased if the university meets or exceeds performance standard targets for that university established annually by the Board of Governors for the following performance standards, amounting to no more than a 2-percent increase in the tuition differential for each performance standard:

- An increase in the 6-year graduation rate for full-time, first-time-in-college students, as reported annually to the Integrated Postsecondary Education Data System.*
- An increase in the total research expenditures.*
- An increase in the total patents awarded by the United States Patent and Trademark Office for the most recent years.*



U.S. News & World Report Top 14 Schools Data

	6-Year Grad Rates	Research Expenditures	Patents Awarded
Top 14 Average	86.44%	\$689 M	61
Annual Change	0.33%	\$16.9 M	7

University of Florida Data

	6-Year Grad Rates	Research Expenditures	Patents Awarded
2013-14 (tentative)	86.51%	\$695 M	106
2014-15 Work Plan Goal	86%	\$695 M	110
2015-16 Work Plan Goal	87%	\$709 M	111
2016-17 Work Plan Goal	87%	\$723 M	112



Performance Standard Target Recommendations - UF

Pending Board Discussion & Approval

Metric 1 - Graduation Rates

Eligible Tuition Differential Increase	1%	2%
UF Benchmark (annual increase %)	0.5%	1%

Metric 2 - Research Expenditures

Eligible Tuition Differential Increase	1%	2%
UF Benchmark (annual increase %)	2% (\$14 M)	4% (\$28 M)

Metric 3 - Patents

Eligible Tuition Differential Increase	1%	2%
UF Benchmark (annual increase #)	2	3



U.S. News & World Report Top 42 Schools Data

	6-Year Grad Rates	Research Expenditures	Patents Awarded
Top 42 Average	80.02%	\$488 M	42
Annual Change	0.60%	\$22.5 M	4

Florida State University Data

	6-Year Grad Rates	Research Expenditures	Patents Awarded
2013-14 (tentative)	76.49%	\$229 M	40
2014-15 Work Plan Goal	79%	\$234 M	41
2015-16 Work Plan Goal	79%	\$238 M	42
2016-17 Work Plan Goal	80%	\$243 M	43



Performance Standard Target Recommendations - FSU

Pending Board Discussion & Approval

Metric 1 - Graduation Rates

Eligible Tuition Differential Increase	1%	2%
FSU Benchmark (annual increase %)	2%	3%

Metric 2 - Research Expenditures

Eligible Tuition Differential Increase	1%	2%
FSU Benchmark (annual increase %)	3% (\$6.7 M)	5% (\$11.2 M)

Metric 3 - Patents

Eligible Tuition Differential Increase	1%	2%
FSU Benchmark (annual increase #)	2	4



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Board of Governors

Performance Funding Model Overview – May, 2014

The Performance Funding Model includes 10 metrics that evaluate the institutions on a range of issues. Two of the 10 metrics are Choice metrics; one picked by the Board and one by the university boards of trustees. These metrics were chosen after reviewing over 40 metrics identified in the University Work Plans.

The model has four guiding principles: 1) use metrics that align with SUS Strategic Plan goals, 2) reward Excellence or Improvement, 3) have a few clear, simple metrics, and 4) acknowledge the unique mission of the different institutions.

Key components of the model:

- Institutions will be evaluated on either Excellence or Improvement for each metric.
- Data is based on one-year data.
- The benchmarks for Excellence were based on the Board of Governors 2025 System Strategic Plan goals and analysis of relevant data trends, whereas the benchmarks for Improvement were determined after reviewing data trends for each metric.
- The Florida Legislature has approved \$100 million in new funding for performance funding and a proportional amount to total \$65 million would come from each university's recurring state base appropriation and another \$35 million from other system initiatives.

Metrics Common to all Institutions:

Seven metrics apply to all eleven institutions. The eighth metric, graduate degrees awarded in areas of strategic emphasis (8a), applies to all institutions except New College. The alternative metric for New College (8b) is "freshman in the top 10% of graduating high school class."

Metrics Common to all Institutions	
1. Percent of Bachelor's Graduates Employed and/or Continuing their Education Further	6. Bachelor's Degrees Awarded in Areas of Strategic Emphasis (includes STEM)
2. Average Wages of Employed Baccalaureate Graduates	7. University Access Rate (Percent of Undergraduates with a Pell-grant)
3. Cost per Undergraduate Degree	8a. Graduate Degrees Awarded in Areas of Strategic Emphasis (includes STEM) (NCF Excluded) 8b. Freshman in Top 10% of Graduating High School Class (NCF Alternative Metric)
4. Six Year Graduation Rate (Full-time and Part-time FTIC)	9. Board of Governors Choice
5. Academic Progress Rate (2nd Year Retention with GPA Above 2.0)	10. Board of Trustees Choice

Board Choice Metric - The Board has approved metrics that focuses on areas of improvement and the distinct missions of each university. UF and FSU have a metric measuring faculty awards to represent the research focus of these institutions. New College has "national ranking for institutional and program achievement." The remaining eight institutions all have the "percentage of students graduating without excess hours".

Board of Trustees Choice Metric - Each Board of Trustees has chosen a metric from the remaining metrics in the University Work Plans that are applicable to the mission of that university and have not been previously chosen for the model.

Board of Governors

Performance Funding Model Overview – May, 2014

How will the funding component of the model work?

To ensure each university is striving to excel and improve on key metrics, there must be a financial incentive. That financial incentive will not only be new state funding, but an equal reallocation of a portion of the base state funding.

New Funding versus Base Funding:

The amount of new state funding appropriated by the Legislature for performance funding will be matched by an equal amount reallocated from the university system base budget. These “base” funds are the cumulative recurring state appropriations the Legislature has appropriated to each institution. The \$100 million of new funding appropriated by the Legislature would be allocated as follows:

New Funding of \$100 M

1. Each university metric is evaluated based on Excellence or Improvement and has five benchmarks ranging from low to high. The lowest benchmark receives one point, while the highest receives five points. The highest points for Excellence or Improvement are counted in the university’s total score.
2. New funding will be allocated based on points earned, with a maximum of 50 points possible.
3. A university must earn more than 25 points in order to be eligible to receive new funds.
4. A university scoring 25 points or less, or the three lowest scoring universities, would not receive any new funds.
5. A university earning more than 25 points would receive new funds proportional to their existing base funds with the highest scoring universities eligible for additional new funds.

Base Funding of \$65 M

1. A prorated amount totaling \$65 million would be deducted from each university’s base recurring state appropriation. The remaining \$35 million comes from other system initiatives.
2. A university earning more than 25 points will have their base funding restored.
3. A university scoring 25 points or less will have to submit an improvement plan to the Board of Governors and show improvement according to that approved plan in order to have their base funding restored.

Board of Governors

Performance Based Funding Model

Changes Approved on November 6, 2014

- Metric 1 (Percent of Bachelor's Graduates Employed and/or Continuing their Education Further 1 Yr after Graduation) - Include graduates in the military and federal government and graduates employed outside of Florida.
 - *Adjustment 1: Data is now available from the Department of Economic Opportunity and Florida Education and Training Placement Information Program (FETPIP) to include military & federal government graduates and graduates employed outside Florida.*
 - *Adjustment 2: Exclude graduates who do not have valid social security numbers if they are not found in the enrollment data.*
 - *Benchmarks will be adjusted to reflect the new system average.*

	1 pt	2 pts	3 pts	4 pts	5 pts
Previous	55%	60%	65%	70%	75%
Revised	60%	65%	70%	75%	80%

- Metric 3 (Average Cost per Undergraduate Degree to Institution) - Modify the benchmark to account for increased costs as additional funds are received.
 - *Adjustment: Adjust the benchmark based on the new system average after reviewing 2013-14 expenditure data.*
 - *Benchmarks will be adjusted to reflect the new system average.*

	1 pt	2 pts	3 pts	4 pts	5 pts
Previous	\$30,000	\$27,500	\$25,000	\$22,500	\$20,000
Revised	TBD	TBD	TBD	TBD	TBD

- Metric 6 (Bachelor Degrees in Strategic Emphasis) (Includes STEM) - Modify the definition to reflect the inclusion of other degrees in Areas of Strategic Emphasis as approved by the Board of Governors November 2013.
 - *Adjustment: In November 2013, the Board approved a new list of strategic emphasis programs. This change aligns the PBF metric to the new categories for degrees awarded in Programs of Strategic Emphasis. The revised list includes: 113 disciplines within STEM, 46 disciplines within Health, 34 disciplines within Education, 24 disciplines within Global Competitiveness, and 10 disciplines identified in the GAP Analysis (i.e. finance, accounting, banking, human resources).*
 - *The Board is not considering changing the 2025 goal for this metric in the System Strategic Plan, so the benchmark does not need to be adjusted.*

Board of Governors

Performance Based Funding Model

Changes Approved on November 6, 2014

- Metric 7 (University Access Rate) - Exclude non-US students since they are not eligible for Pell Grants.
 - *Adjustment: Non-US students shall be removed from both the numerator and denominator because they typically are not eligible for Pell grants.*
 - *Note: A small percentage of non-US students do receive a Pell grant but these are for special circumstances as detailed by the US Dept of Education – for more information see:*
<https://studentaid.ed.gov/eligibility/non-us-citizens>.
 - *The benchmarks reflect the Board's Strategic Plan, so the benchmark does not need to be adjusted.*
- Metric 8a (Graduate Degrees in Strategic Emphasis) (Includes STEM) - Modify the definition and benchmarks to reflect the inclusion of other degrees in Areas of Strategic Emphasis as approved by the Board of Governors November 2013.
 - *Adjustment: In November 2013, the Board approved a new list of strategic emphasis programs. This change aligns the PBF metric to the new categories for degrees awarded in Programs of Strategic Emphasis. The revised list includes: 113 disciplines within STEM, 46 disciplines within Health, 34 disciplines within Education, and 24 disciplines within Global Competitiveness.*
 - *The Board is considering changing the 2025 goal for this metric in the System Strategic Plan, so the benchmark does need to be adjusted.*

	1 pt	2 pts	3 pts	4 pts	5 pts
Previous	30%	35%	40%	45%	50%
Revised	40%	45%	50%	55%	60%

- Metric 9 (National Ranking) (NCF Board of Governors' Choice) - Add *Fiske Guide* to the methodology for awarding performance points for the National Ranking metric. The methodology for 2014-15 performance funds used a list of 12 ranking systems that were developed for the pre-eminence legislation.
 - *Adjustment: Add Fiske Guide, and any other rankings as adopted in the Board's Strategic Plan, to the list. The updated list of ranking systems includes Princeton Review, Fiske Guide, QS World University Ranking, Times Higher Education World University Ranking, Academic Ranking of World University, US News and World Report National University, US News and World Report National Public University, US News and World Report Liberal Arts Colleges, Forbes, Kiplinger, Washington Monthly Liberal Arts Colleges, Washington Monthly National University, and Center for Measuring University Performance.*
 - *NCF's benchmarks will not be adjusted.*



State University System 2014-2015 Performance Funding Initiative

Universities were requested to provide information on the intended use of the 2014-2015 performance funds.

The following activities are currently underway at the university as a result of the performance funds allocated to the system for FY 2014-2015:

- Initiation of a Center for Undergraduate Student Success designed to increase student retention, student progression, and student graduation; FAMU;
- Investments in academic program accreditation to obtain initial accreditation and reaccreditation of academic programs such as the salary increases for Pharmacy faculty in order to maintain accreditation – FAMU;
- Bolstering tutoring, mentoring, lab and writing services to better assist students in meeting educational goals – FGCU;
- Additional full time and adjunct faculty to meet the growing demand by students for classes needed towards graduation – FGCU;
- Implementation of an academic term redesign project to assist students in enrolling and progressing more timely towards their degree goals – FIU;
- Investing in classroom enhancements, initiatives to retain students, and student academic support to help students excel in their degree programs – FIU;
- Investing in energy and materials, coastal and marine ecosystems, and brain health and disease initiatives – FSU;
- Enhancing efforts in entrepreneurship activities to enable faculty and students to take ideas to the marketplace, fund an enhanced start-up competition, create start-up incubators, create partnerships between business majors and graduate students in critical areas and create a platform for investors to partner with the institution – FSU;
- Additional faculty to enhance undergraduate and graduate academic experiences by ensuring the availability of course offerings to meet student demand – UCF;
- Utilizing big data, modeling, and data mining to deliver personalized, real-time recommendations designed to facilitate student completion and success – UCF;

- Merit pay raises to reward and retain faculty and staff to ensure the goals of preeminence are met – UF;
- Funds to improve career counseling and to increase student internship placements – UNF;
- Investments in faculty and technology in areas of strategic emphasis, and aggressive recruitment and retention programming – UNF;
- Creation of a College and Career Success/ Access Center to provide a coordinated, college-wide tailored to each students' unique career path needs – USF-S/M;
- Exploring the establishment of a new College of Applied Sciences that will create linkages with environmental science initiatives at New College of Florida and other engineering programs housed at other colleges and universities throughout the state – USF-S/M.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	Florida A&M University
Amount Allocated:	\$10,844,591

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. **Description:** The funds will supplement external funds to help initiate a Center for Undergraduate Student Success including a summer bridge program: This Center will build on and consolidate some initiatives in student retention begun in the past 4 years. This new investment is designed to increase student retention, progression and graduation. This will consolidate a number of efforts surrounding student academic advising, career counseling, tutoring, and student debt reduction. The University is also reviewing options for a student tracking system such as University of Florida's system which some other SUS institutions have adapted, or a commercial product such as Degree Works to help monitor successful student progression through majors and enable the university to intervene if students do not seem to be making adequate progress.

Investments are being made in academic program accreditation to obtain initial accreditation or reaccreditation of academic programs. This included meeting the remainder of the salary increases for Pharmacy faculty in order to maintain accreditation. Meeting the accreditation standards provides quality assurance, assists students successfully matriculate through the programs, and provides an advantage in seeking employment upon graduation.

A new program, BS/BA Interdisciplinary studies, is being implemented in Fall 2014, using some of the funds, which will provide an avenue for students to progress and complete their baccalaureate degree.

Providing an increase is essential to retaining and recruiting faculty and staff and increasing morale, which will impact the instructional and other services students will receive. The University is also investing in new faculty hires to reduce reliance on adjuncts in favor of full time faculty. This too will enhance student success.

The goal of the **Targeted Educational Attainment (TEAM)** Grant awarded to FSU and FAMU is to increase the number of bachelor's degrees awarded in the areas of computer science, information technology, and computer engineering. The project focuses on:

- a) Expanding outreach efforts to students in high schools and state colleges,
- b) Enhancing the retention of students and placement of graduates in internships and jobs,
- c) Establishing strong partnerships with business and industry,
- d) Providing ongoing professional development for students, and
- e) Developing a media presence to promote computer and information technology careers.

II. Return on Investment

	ONE-YEAR TREND	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
FTIC 6 year Graduation Rate [Includes full- and part-time students]	2%	42%	43%	44%
Academic Progress Rate [FTIC 2 year Retention Rate with GPA>2]	7%	73%	76%	77%
Percent of Bachelor's Degrees Without Excess Hours	n/a	35%	37%	39%

Key Performance Metrics for the FAMU TEAM Project:

- Unduplicated Upper Division Enrollment (Increase of ~26% by 2017).
- Number of Bachelor's Degrees Earned (Increase of ~26% by 2017)
- Completion Rates (Increase to ~75% by 2017).



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	Florida Gulf Coast University
Amount Allocated:	5,936,120

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I The influx of performance funds has permitted Florida Gulf Coast University (FGCU) the opportunity to continue to meet mission objectives and achieve greater performance going forward. To that end, the institution has enacted multiple initiatives (with the Return on Investment immediately following):

Advising: Building upon steps taken in FY 13-14, FGCU has established ten additional faculty advisor positions in order to provide a “best practice” ratio of advisors to students. A focus will be made on “super seniors”, who are seniors with more than enough credits to graduate but still accumulate credits. Additionally, the First Year Advising Center has a presence, located at the newly constructed Eagle Hall, providing support and advising to students within their living environment. The approximate allocation is \$540,000

Return on Investment: We anticipate this will in part lead to a 4-percentage point gain in the FTIC-graduation rate to occur by 2016-2017. This should also add to our degree production in areas of strategic emphasis at the bachelor’s level (3 percentage points) and at the graduate level (3 percentage points). And it should help us reduce the percentage of graduating students earning excess credits with a resulting increase of 3 percentage points (i.e., from the current 74% to 77% of all graduating student with no excess hours).

Retention Strategies: To further assist with student retention, FGCU is bolstering its tutoring, lab, writing center and mentoring functions, to greater assist students towards meeting their educational goals. The Careers Services department has been funded in order to expand its reach, and Adaptive Services has grown in order to assist with accommodative testing. The approximate allocation is \$405,500.

The institution has enacted a program known as the “First Year Experience” and will be developing programs aimed at new students with the goal of enhancing success and increasing retention. As part of this program, FGCU is hosting STEM camps to make potential students aware of degrees in STEM, including first generation and underrepresented students. The cost of this initiative is approximately \$144,200

Return on Investment: These support programs should help us increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; our FTIC graduation rate by 4 percentage points; these actions should also help us to increase the university access rate (i.e., from 35% in 12-13 to 39% in 2016-2017); graduate more minority students by 3 percentage points (i.e., 23% to 26% of the annual total) and increase in part our bachelor’s degree production in areas of strategic emphasis by 3% points between 12-13 and 16-17 (i.e., from 44% to 47% of total bachelor’s degrees awarded).

Faculty Hiring: Florida Gulf Coast University is a growing campus, and as such is investing in the faculty and adjuncts necessary to offer a schedule that not only meets demand, but provide programs that target academically talented students. This investment of \$2,317,425 will provide new and returning students with the classes needed to progress towards graduation.

Return on Investment These additions should help us in part to further reduce the number of students graduating with excess credit hours with a resulting increase of 3 percentage points (i.e., from the current 74% 12-13 to 77% 16-17 of all graduating student with no excess hours); increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; and our FTIC graduation rate by 4 percentage points over this same time period.

Support Staff: In coordination with the hiring of new faculty, academic support staff are being brought in to not only support the faculty, but to support web learning and data analysis. Furthermore, added funds in other personal services and expense are required to meet growing operational costs stemming from growth and inflation. The total allocated is \$587,300

Return on Investment: These support programs should help us increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; our FTIC graduation rate by 4 percentage points; these actions should also help us to increase the university access rate (i.e., from 35% in 12-13 to 39% in 2016-2017).

Marketing: The institution is investing \$500,000 in the development of marketing team and strategy, for the purpose of reaching out to potential students and attracting talent to the university and the state.

Return on Investment: This strategy will in part contribute to increase the university access rate (i.e., from 35% in 12-13 to 39% in 2016-2017) and eventually graduate more minority students by 3 percentage points (i.e., 23% to 26% of the annual total over this same time period.)

Library Resources: Library materials are another area of investment which is needed to assist students in their progression. By maintaining a current library collection, students are able to assimilate the best possible information and data. For fiscal year 14-15, the institution is investing \$110,000.

Return on Investment: These additions to our Library should help us increase in part our academic progress rate by 4 percentage points between 12-13 and 16-17; and, our FTIC graduation rate by 4 percentage points

Operations: The balance of the funding (approximately 1,330,000) is allocated for operational infrastructure. These funds will provide the needed infrastructure to maintain the campus. Examples include campus police, computer programmers, admissions officers, and various roles within student affairs. This investment provides the infrastructure to a productive learning environment.

Return on Investment: The enhanced efficiency these infrastructure changes bring about will in part help us to control cost per degree which we hope will remain below \$30,000 over the next several years.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	Florida International University
Amount Allocated:	\$25,277,175

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. **Description** *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

The funds allocated will be used to continue to improve areas that focus on innovation and teaching and create a stimulating environment for student learning. The main areas of focus are related to improving academic progress, improving the six year graduation rate, and expanding areas of study in programs with strategic emphasis for the state and community.

FIU will focus efforts on improving our academic progress rate. A significant amount will be invested in classrooms enhancements, initiatives to retain students, and student academic support to help students excel.

Another area of emphasis is improving our FTIC six-year graduation rate. Funds will be used to hire more faculty in strategic areas and revise the academic term structure to meet student demand through an academic term redesign project. This project will provide additional options for students to enroll and progress more timely to their degree completion while building on the success of the Graduation Success Initiative (GSI).

Lastly, we will be investing in expanded science offerings, more peer-led learning groups, and progressive faculty-led curricular in an effort to deepen our role as the nation's leading producer of STEM degrees for minority students. These initiatives will support the production of degrees within programs of strategic emphasis.

These initiatives combined with career and internship programs, will provide our students a high quality, well-rounded and first-rate educational experience from admissions through graduation and into the workforce.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

We plan to improve the retention rate by offering the programs and courses desired and required for enrollment and progression. The projects to be implemented reflect our goals to be student driven and student focused. All of these investments will enable students to complete courses faster and meet their degree completion goal. We plan to increase our Academic Progress Rate from 78% to 81% by 2016-2017.

Our goal is to increase the FTIC six-year graduation rate by 2% per year and attain a 58% rate by 2016-2017. We plan to do so by providing more options to students to complete their degree requirements through additional terms for online and onsite programs. The institution will leverage improved data analytics to ensure available class sections are available for degree completion. Students will also benefit by being able to better closely monitor their progress and make more informed decisions.

Our STEM focused program, FIUteach, prepares Math and Science related teachers and is expected to graduate 50 high school STEM teachers annually. As the top producer of STEM degrees for minorities, FIU will continue to expose students to innovative evidence-based instruction and learning technologies and allocate funding to support their success. This initiative along with other improvements will contribute to a 2% increase in Bachelor's and Graduate degrees awarded within programs of strategic emphasis by 2016-2017.

FIU is also expanding internship opportunities locally, nationally and internationally. Internship opportunities ensure our students gain practical skills for the work place while building relationships and contribute to increasing the percentage of bachelor's graduates employed full-time in Florida. We anticipate this metric to improve from 67% to 69% by 2016-2017.

Investments to improve the metrics mentioned above will have a multiplier effect and positively impact the results of other metrics such as percentage of

bachelor's degrees without excess hours, average cost per bachelor's degree, and median wages of graduates employed full-time. Ultimately, all these initiatives are accomplished by investing in faculty, staff, infrastructure, and program implementation that create well-educated employees and entrepreneurs. FIU's obligation to produce degrees that make it possible for graduates to put learning and research to work on a regional, national and global stage is paramount.

FIU is working closely with the Miami-Dade County to ensure that higher education initiatives are directed to job creation and entrepreneurship in the community. Our students have very strong community ties as a significant number of FIU graduates live and work in the three-county area of South Florida. When combined with our efforts to increase the degrees awarded in programs of strategic emphasis, and achieving our goal to graduating students sooner in targeted industries, FIU will be making a significant contribution to the economic development of our community in South Florida and the state of Florida.



**2014-2015 Performance Funding Model (10-Metrics)
Reporting Template
Justification Form**

University:	FLORIDA STATE UNIVERSITY
Amount Allocated:	\$21,064,887

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I. **Description** *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

FSU's primary initiative at this point in time is to become a National Top 25 Public University, a ranking highly dependent on strategic investments. We are actively engaged in strategic hiring initiatives in energy and materials, coastal and marine ecosystems, and brain health and disease. We are also continuing to invest in resources to support graduate students in critical fields and to increase undergraduate research opportunities in a variety of fields including those critical to the state of Florida.

FSU is also focused on becoming a State and National Leader in Student Career Readiness. Currently, we are enhancing our curriculum to support critical thinking, problem-solving, communication, collaboration, creativity and innovation skills, all integral to the success of our students. Our Entrepreneurial University Program also supports this strategic initiative, giving students of any major access to business courses. We have invested in additional faculty that are necessary to open a four-course sequence in entrepreneurship to all majors, as continuing to add Entrepreneurs-in-Residence to our colleges to enable both faculty and students to take ideas to the marketplace, fund an enhanced start-up competition, create start-up incubators, create partnerships between business majors and graduate students in critical fields, and create a platform for investors to partner with the University.

We are continuing efforts to improve student-to-faculty ratios by recruiting, developing, and retaining outstanding faculty members to address student needs at all levels. Through success in faculty hiring and improving our student to faculty ratio, our strategic goals, including those of becoming a National Top 25 Public University, can be achieved.

Our strategic initiatives will have a positive impact on our accomplishments relative to the performance funding metrics, particularly those related to academic progress and graduation rates, degrees awarded in areas of strategic emphasis, post-graduation performance and faculty awards. We will also continue to invest in our status as one of the nation's most efficient institutions by constantly seeking new opportunities for efficiency.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

Targeted hiring in critical areas will help to address needs of the state of Florida. These investments are tied to research funding initiatives, and are expected to result in increases in national rankings of our programs and institution. We expect to maintain at least one field in the top 5, achieve two fields in the top 10, one in the top 15, two in top the 20, and move Engineering into the top 50. These advances in recognition of our programs will place FSU among the truly first-rate public universities and help us achieve our top 25 ranking among all public universities.

Efforts related to Student Career Readiness will serve to strengthen the value of any degree offered at FSU. Opening business courses to students of any major and strengthening students' critical thinking, problem-solving, communication, collaboration, creativity and innovation skills will promote the entrepreneurial potential and job prospects of all students. Related programs will also build FSU's community and industry partnerships.

The loss of faculty in recent years has resulted in decreased course availability and larger classes, likely increasing students' time to graduation. Having fewer faculty members also diminishes the ability of the university to

accomplish its research mission and expand contract and grant funding, all of which also reduce opportunities for our students who benefit by working directly with faculty in their research labs. Hiring efforts will result in tangible improvements related to the efficient use of dollars, along with more intangible gains in the quality of education provided to our students and enrichment of their overall experience on campus. World-class programs delivered by a dedicated and creative faculty inspire students to reach new levels of achievement.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	University of Central Florida
Amount Allocated:	\$21,880,157

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. **Description** (*Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.*)

The Performance-based Funding Model has made possible the continuation and/or creation of a number of initiatives and programs that will directly drive improvements in academic quality, operational efficiency, and return on investment, as follows:

Faculty Hiring

\$17,056,461

(\$1,900,000 for planned 2014-15 hires + \$10,450,033 for planned 2015-16 hires + \$4,706,428 for planned 2016-17 hires)

New funding from state Legislature will allow UCF to hire upwards of 100 additional full-time faculty members over the next few years, particularly in the areas of specific focus (e.g. STEM, areas of strategic programmatic emphasis, and emerging fields).

Due to the timing of the allocation of funds and the faculty recruitment cycle, the majority of the hires will take place next fiscal year. The estimated ending balance as of June 30, 2015 will be used on a non-recurring basis to support faculty start-up packages for these hires, which are a necessary and expensive tool to recruit and retain exceptional faculty.

Hiring full-time faculty members enhances the undergraduate and graduate academic experience by ensuring the availability of course offerings to meet student demand; decreasing class size; increasing student engagement; supporting undergraduate and graduate research; and stabilizing UCF's student-to-faculty ratio.

While UCF will hire some full-time lecturers to address our teaching missions, the majority of these 100+ new hires will be tenure-track faculty. An emphasis on hiring tenured and tenure-track faculty members addresses the overall mix of faculty and the recent reliance on non-tenure-track faculty members, while boosting UCF's growing research promise and potential economic impact. Additionally, UCF is encouraging cross-disciplinary hires to support interdisciplinary teaching and research, in such fields as bioinformatics and data analysis.

To ensure continued growth and quality of research and graduate activity, UCF also plans to expand and enhance programs in focused areas. This will include the hiring of research-intensive faculty members; the expansion of biomedical and clinical research; the development of new graduate medical education programs; and the development of new health-related programs that capitalize on College of Medicine partnerships. Increasing graduate activity also furthers the volume and economic impact of UCF research, building upon the \$1.1 billion in external research grants received in the past decade.

Civitas Learning and Predictive Analytics Reporting (PAR)

\$235,000

Partnering with an external partner, Civitas Learning, UCF continues to make excellent progress towards its goal of utilizing big data, modeling, and data mining to deliver personalized, real-time recommendations designed to facilitate student completion. Supporting UCF's Civitas effort is a 20-school coalition called the Predictive Analytics Reporting Framework. Initially funded by the Gates Foundation, this group combines big data from all 20 schools to more precisely identify clusters of at risk students and then develop solutions for their challenges.

UCF's involvement includes contributing data to a single federated database spanning twenty institutions, assessing cross-institutional benchmarks, evaluating institutional-specific predictive models, and cataloging over 70 best practices that will allow for the direct mapping of successful interventions to specific student predictor behaviors.

DARS to PeopleSoft Conversion

\$1,441,781

The conversion of UCF's undergraduate degree advising/audit software from the DARS system to PeopleSoft initiated last fiscal year is underway, and will add a new dimension to the predictive models also well under development.

During the current phase, the 395 program builds required for each year across four catalog years are being created. To date, 13% of programs are verified and 31% are in-progress.

Graduate Fellowship Program

\$695,000

It is anticipated that these funds will permit UCF to award a one-time, \$5,000 fellowship to up to 139 qualified Master's students in programs of strategic emphasis during the 2014-15 academic year.

Targeted Educational Attainment (TEAm) Grant Projects

In 2013-14, UCF, USF, and FIU were awarded legislatively appropriated funds by the Board of Governors to pay down the gap in Information Technology, Computer Science, Computer Engineering, and Management Information Systems. Additionally, the same collaborating institutions were awarded funds to individually implement a number of jointly developed interventions aimed at increasing the number of bachelor's degrees in accounting at their respective institutions.

The funds for each of these programs are being invested, as follows:

CSIT (UCF-USF-FIU) TEAm: Urban University Coalition Response to Florida's Computer and Information Technology Workforce Needs

\$1,790,667

The three institutions are collaborating with the intent of jointly furthering the following objectives:

1. Assist UCF, FIU and USF to grow programs that lead to high-skill jobs in computer-related disciplines,
2. Increase the number of Floridians completing programs in these high demand areas at these institutions, and
3. Wisely leverage the strengths of UCF, FIU, and USF for a sustainable future.

The partnering institutions will use BOG funding—as well as committed university funding—to support additional faculty hires, adjunct hires, course facilitators, teaching assistants, and undergraduate advisors that will be essential to handle a dramatic anticipated increase in undergraduate, computer-related fields. A Metrics and Assessment Committee has been established to measure progress towards established goals and return on investment.

An innovative, collaborative approach to increasing the supply of quality accounting graduates in Florida

\$661,248

The interventions aimed at increasing the number of bachelor's degrees in accounting comprise the following: (a) capping class sizes and increasing the number of sections of key upper-level accounting courses by hiring additional instructional faculty; (b) developing online tutorials and increasing the number of live tutors to facilitate successful completion of rigorous upper-level accounting courses; (c) hiring an internship coordinator to identify accounting internship opportunities and match students with these opportunities; (d) incentivizing timely graduation by providing scholarships to students who successfully follow the recommended course completion path; (e) hiring advisors for accounting students to provide targeted advice and closely track the progress of accounting students to facilitate timely graduation; (f) developing week-long summer “bridge programs” for high-school students aimed at educating them about careers in accounting and the nature of an undergraduate program in the field; and (g) expanding marketing of the accounting major, among both high-school students and college freshmen who are undecided on their major.

Other Initiatives/Programs and Partnerships

Additionally, UCF continues its efforts to enhance student success with the following initiatives and partnerships:

DirectConnect to UCF, the nation's most successful articulation program between local colleges and their university;

The Florida Consortium of Metropolitan Research Universities—FIU, USF, and UCF—has received a grant from the Helios Education Foundation that supports a team of 20 professionals to pursue joint efforts. The Consortium has already had significant success with the award of two of the four SUS TEAM grants, supporting the enrollment and success of students in areas of strategic emphasis;

The National University Innovation Alliance, funded by USA Funds and the Ford, Gates, Kresge, and Lumina foundations, is committed to providing access to students—especially low-income and first generation students—to affordable education at each of our research-intensive universities. The 11 member Alliance includes Arizona State, Georgia State, Iowa State, Michigan State, Ohio State, Purdue, California-Riverside, Kansas, Oregon State, and Texas-Austin.

Several Alliance initiatives are in progress. One of the most promising has been the identification of a best practice for student success by each of the eleven schools. Three member institutions have then volunteered to join the lead institution and test the scalability of the practice with a goal of its being adopted by all the Alliance schools;

The John N. Gardner Institute for Excellence in Undergraduate Education, to institute a nine-dimension action program to enhance transfer student success. Among the nine actions are raising faculty awareness of transfer issues, shaping the university culture to better accommodate transfer students, and focusing on transfer student transition points;

The UCF Task Force on Excess Hours, which is at work on a number of reduction strategies, including the addition of an excess-hours calculator on every student's online degree plan showing how many excess hours the student's planned course of study will generate; the creation of a STEM interdisciplinary major; a tightening of the withdrawal-from-class policy; and an intensive campaign to educate students about the causes and consequences of excess hours.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

As a result of the continued and combined efforts and new strategies described above, UCF is projecting improvements in all metrics as specifically outlined in the university's 2014-15 Work Plan—particularly the six-year graduation rate, academic progress rate, bachelor's and graduate degrees awarded in programs of strategic emphasis, and number of bachelor's degrees awarded annually.

Some notable anticipated outcomes include a 90 percent academic progress rate and a 70 percent six-year graduation rate during the next three years. At the same time, the university is projecting less than 1 percent increase in the cost-per-bachelor's degree, compared to the projected 2 percent consumer price index increase between 2014 and 2015.

Also worthy of mention is that the CSIT TEAm program is anticipating a 67% increase of degrees in the computer-related fields by 2017-2018. The significant increase in degrees is a bold and challenging initiative, but one that carefully focuses on the goal of this TEAm grant effort to significantly reduce the workforce gap in the computer-related fields.

Additionally, it is projected that the number of UCF's patents will grow, and the metric will continue to distinguish the university's research activity. This past year, UCF was ninth among U.S. public universities for the number of patents produced.

Finally, UCF continues to grow the number of degrees awarded in areas of strategic emphasis, and currently accounts for 21% of all baccalaureate degrees granted in the State University System (and 17% of all baccalaureate degrees in areas of strategic emphasis).



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	University of Florida
Amount Allocated:	\$27,560,214

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

- I. **Description** *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

These funds have been allocated to raises for faculty, staff, and graduate students. Faculty have been allocated a 3.5% merit pay raise package, staff have been allocated a 2.5% merit pay raise package, and graduate assistants have been allocated a pay raise package amounting to approximately 4%.

- II. **Return on Investment** *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

Faculty merit pay raises are needed to reward and retain UF's best faculty and to ensure the goals of the preeminence initiative are met. Similarly, graduate assistant pay raises are needed to keep graduate stipends competitive and enable UF to attract excellent students. Staff pay raises are allocated to reward and retain outstanding staff members.

These pay raises improve morale and productivity and help UF retain key personnel.



2014-2015 Performance Funding Model (10-Metrics) Reporting Template Justification Form

University:	University of North Florida
Amount Allocated:	\$7,360,977

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. Description (*Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.*) The \$7.4 million dollars will be used to advance UNF's performance on nine of the ten metrics adopted and identified and selected by the Board of Governors. The university will also be working on the 10th metric, increasing use of distance learning, but will be using other funds. The greatest attention will be focused on the academic progress rate and its corollary the six year graduation rate, followed by producing graduates in strategic areas of emphasis. Funding for these four metrics takes various forms including improved advising, programs to turn gatekeeper into gateway courses, investments in faculty and technology in areas of strategic emphasis, and aggressive recruitment and retention programming.

By working on recruitment programs we should also be able to increase our undergraduate enrollments modestly helping to bring down the cost of an undergraduate degree, although we remain committed to small class sizes and the use of fulltime faculty in teaching undergraduate coursework.

The funding we have directed for Career Services will be used for improved career counseling and to increase student internship placements, addressing both selection of majors of study and post-graduation placement in the workforce.

Some of the funding will also be used to balance university reserves in keeping with state law.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

The dashboards we have set for the University of North Florida for each of the ten metrics appear below.

METRICS	2012-13 ACTUAL	2013-14 ESTIMATES	2014-15 GOALS	2015-16 GOALS	2016-17 GOALS
1. Percent of Bachelor's Graduates Employed Full-time in Florida or Continuing their Education in U.S. 1-Year After Graduation	69%	71%	73%	74%	75%
2. Median Wages of Bachelor's Graduates Employed Full-time in Florida 1-Year After Graduation	\$34,200	\$34,681	\$35,169	\$35,664	\$36,166
3. Average Cost per Bachelor's Degree	\$29,350	\$28,945	\$28,546	\$28,152	\$27,764
4. FTIC 6-year Graduation Rate	49%	50%	50%	51%	52%
5. Academic Progress Rate	76%	78%	79%	80%	81%
6. University Access Rate	36%	36%	37%	37%	38%
7. Bachelor's Degrees Awarded Within Programs of Strategic Emphasis	45%	45%	46%	47%	48%
8. Graduate Degrees Awarded Within Programs of Strategic Emphasis	51%	51%	53%	55%	57%
9. Percent of Bachelor's Degrees Without Excess Hours	71%	72%	73%	74%	75%
10. Percent of Course Sections Offered via Distance and Blended Learning	9%	11%	13%	15%	17%



**State University System
Education and General
2014-2015 Performance Funding Model (10-Metrics)
Reporting Template
Justification Form**

University:	University of South Florida System
Amount Allocated:	\$22,273,322

Universities should adopt strategic goals and objectives conducive to the investment activities of the performance funds.

I. Description *(Describe how these funds will be used to support and/or enhance educational and student support to allow for continued improvement on performance metrics.)*

For USF, the awarded performance funds are to be utilized to promote its 2013-2018 Strategic Plan and related Performance and Accountability matrix. Within that matrix, several targets directly correlate to the 10-metric funding model criterion. Therefore, the funding will be directed to specific initiatives or areas of targeted improvement to positively impact the achievement of the milestones within our strategic plan such as retention and graduation rates, merit-based financial aid, faculty in support of STEM and strategic areas of emphasis, to support the planned growth of funded research with postdoctoral appointees, and student career access and support.

II. Return on Investment *(Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment to the State of Florida. Be specific. For example, if this issue focuses on improving internship opportunities at your university, indicate the number of internships expected, the metric(s) that could be improved and to what level of improvement, and how the improvement could benefit the ROI to the State of Florida.)*

Investments were made to achieve targeted outcomes for 2014/15 which directly correlate to several of the 10-metrics USF is accountable towards, as follows:

1. Investment made in incremental Financial Aid

- a. 14/15 Targeted Outcomes include:
 - i. 60% University Access Rate
 - ii. 37% Undergraduate students receiving Pell Grants
- b. Performance Metrics addressed include:
 - i. #3, Average cost per Bachelor's degree
 - ii. #6, University Access Rate

2. Investment Made for Faculty in Areas of Strategic Emphasis

- a. 14/15 Targeted Outcomes include:
 - i. Student to faculty ratio of 24-to-1
 - ii. Baccalaureate degrees in STEM of 26%
 - iii. Baccalaureate degrees in Areas of Strategic Emphasis of 55%
- b. Performance Metrics addressed include:
 - i. #7, Baccalaureate degrees in Areas of Strategic Emphasis
 - ii. #8, Graduate degrees in Areas of Strategic Emphasis
 - iii. #10, Number of Post-Doctoral Appointees

3. Investment Made for Academic Support staff and Career Services

- a. 14/15 Targeted Outcomes include:
 - i. Full-time Freshman retention rate of 90%
 - ii. Academic Progress Rate (2nd yr. retention w/GPA>2.0) 86%
 - iii. 6-year Graduation Rate of 59%
- b. Performance Metrics addressed include:
 - i. #4, 6-year Graduation Rate
 - ii. #5, Academic Progress Rate

Board of Governors
Implementation of House Bill 851
Preeminent Universities - Tuition Differential Summary

Each of the preeminent universities has indicated as their aspirational target the *US News & World Report* rankings for public universities. The University of Florida (UF) and Florida State University (FSU) aspire to be in the Top 10 and Top 25 respectively. In order to align with these aspirations, the Board Staff has calculated the average performance in each metric of the full list of universities ranked ahead of UF and FSU.

For UF this means using the 14 schools ranked above them and for FSU the 42 schools ranked above them. Using this methodology enables the universities to be judged against all of their competitors and have benchmarks set toward improving against all of these schools.

The benchmarks set up a matrix that determines how much of an increase in tuition the school is eligible to request.

University of Florida		Benchmark 1 1%	Benchmark 2 2%
Metric 1 – Graduation Rates	Annual Increase %	0.5%	1%
Metric 2 – Research Expenditures	Annual Increase %	2%	4%
Metric 3 - Patents	Annual Increase #	2	3

Florida State University		Benchmark 1 1%	Benchmark 2 2%
Metric 1 – Graduation Rates	Annual Increase %	2%	3%
Metric 2 – Research Expenditures	Annual Increase %	3%	5%
Metric 3 - Patents	Annual Increase #	2	4

A university must meet Benchmark 1 to be eligible for a tuition differential increase. One important note is that if a school has an increase in one of the metrics over the previous year that is in between the benchmarks, that university can request a tuition increase for a portion of the established benchmark.

For example, if UF increased graduation rates by 0.7% over the prior year they would be eligible for up to a 1.4% ($0.7\% / 1\% \times 2\%$) increase in tuition differential for that metric. If UF had a 1.9% increase in research expenditures over the prior year they would not be eligible for a tuition differential increase for that metric. If UF increased patents by 4, they would be eligible for a 2% increase in that metric.

In this example, UF would be eligible to increase tuition differential up to 3.4% ($1.4\% + 2.0\%$) upon approval by the Board of Trustees and then Board of Governors.

UF Preeminence Metric Benchmarks - *All schools above UF*

Rank	Institution	Graduation Rate	Research Expenditures (millions)	Patents
1	University of California – Berkeley	91%	\$696,904	61
2	University of California - Los Angeles	92%	\$969,682	74
2	University of Virginia	93%	\$363,569	29
4	University of Michigan - Ann Arbor	91%	\$1,253,400	97
5	University of North Carolina - Chapel Hill	89%	\$864,748	39
6	College of William and Mary	90%	\$46,547	3
7	Georgia Institute of Technology	79%	\$683,894	80
8	University of California - San Diego	86%	\$1,065,306	94
9	University of California - Davis	81%	\$704,999	26
10	University of California - Santa Barbara	80%	\$222,916	45
11	University of California - Irvine	86%	\$335,874	25
11	University of Illinois - Urbana-Champaign	84%	\$558,022	85
13	University of Wisconsin - Madison	82%	\$1,030,605	167
14	Pennsylvania State University - University Park	86%	\$789,837	32
	Average	86%	\$689,646	61

FSU Preeminence Metric Benchmarks - *All 42 schools above FSU*

Rank	Institution	Graduation Rate	Research Expenditures (millions)	Patents
1	University of California - Berkeley	91%	\$696,904	61
2	University of California - Los Angeles	92%	\$969,682	74
2	University of Virginia	93%	\$363,569	29
4	University of Michigan - Ann Arbor	91%	\$1,253,400	97
5	University of North Carolina - Chapel Hill	89%	\$864,748	39
6	College of William and Mary	90%	\$46,547	3
7	Georgia Institute of Technology	79%	\$683,894	80
8	University of California - San Diego	86%	\$1,065,306	94
9	University of California - Davis	81%	\$704,999	26
10	University of California - Santa Barbara	80%	\$222,916	45
11	University of California - Irvine	86%	\$335,874	25
11	University of Illinois - Urbana-Champaign	84%	\$558,022	85
13	University of Wisconsin - Madison	82%	\$1,030,605	167
14	Pennsylvania State University - University Park	86%	\$789,837	32
14	University of Florida	85%	\$649,988	70
14	University of Washington	81%	\$1,066,228	70
17	University of Texas - Austin	79%	\$549,312	141
18	Ohio State University - Columbus	82%	\$720,082	40
19	University of Connecticut	82%	\$250,468	27
20	Clemson University	82%	\$110,493	14
20	Purdue University - West Lafayette	70%	\$536,438	42
20	University of Georgia	81%	\$311,498	29
20	University of Maryland - College Park	82%	\$498,417	61
20	University of Pittsburgh	79%	\$839,793	43
25	Texas A&M University - College Station	80%	\$752,775	34
26	Rutgers, the State University of New Jersey	79%	\$454,302	28
27	University of Iowa	70%	\$432,980	32
27	University of Minnesota - Twin Cities	73%	\$827,695	38
27	Virginia Tech	83%	\$448,054	13
30	Indiana University - Bloomington	77%	\$151,240	8
30	Miami University - Oxford	81%	\$21,151	5
30	SUNY College of Environmental Science and Forestry	72%	\$28,509	2
30	University of Delaware	80%	\$161,327	16
30	University of Massachusetts - Amherst	73%	\$178,207	57
35	Michigan State University	77%	\$471,620	30
35	University of California - Santa Cruz	73%	\$149,824	4
35	University of Vermont	76%	\$115,569	4
38	Binghamton University - SUNY	81%	\$73,098	22
38	Colorado School of Mines	70%	\$55,925	7
38	Stony Brook University - SUNY	66%	\$218,209	21
38	University of Alabama	67%	\$52,021	19
38	University of Colorado - Boulder	70%	\$373,512	23
	Average	80%	\$488,143	42

THE FLORIDA SENATE

APPEARANCE RECORD

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

January 7, 2015

Meeting Date

Bill Number (if applicable)

Topic Update on Assessment Requirements

Amendment Barcode (if applicable)

Name Pam Stewart

Job Title Commissioner of Education

Address 325 W. Gaines Street

Phone 850-245-9663

Street

Tallahassee

Fl

32399

City

State

Zip

Email Pam.Stewart@fldoe.org

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.

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)

1/7/15
Meeting Date

Topic Update on Assessments

Bill Number N/A
(if applicable)

Name Vince Verges

Amendment Barcode N/A
(if applicable)

Job Title Deputy Commissioner of Assessment

Address 325. W. Gaines Street

Phone 850-245-9633

Tallahassee FL 32399
City State Zip

E-mail Vince.Verges@Fldoe.org

Speaking: ☐ For ☐ Against ☒ Information

Representing DOE

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

3

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

1-7
Meeting Date

Bill Number (if applicable)

Topic Performance Funding

Amendment Barcode (if applicable)

Name Tom Kuntz

Job Title Vice Chair, Board of Governors

Address _____ Phone _____
Street

City

State

Zip

Email _____

Speaking: ☐ For ☐ Against ☒ Information

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

Representing 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

4

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

1/7/2015
Meeting Date

N/A
Bill Number (if applicable)

N/A
Amendment Barcode (if applicable)

Topic PERFORMANCE FUNDING

Name DR. JUDY GENSIAFT

Job Title PRESIDENT, USF SYSTEM

Address 4202 E. FOWLER AVE CGS 401
Street

Phone 813 974 5437

TAMPA FL 33620
City State Zip

Email

Speaking: ☐ For ☐ Against ☒ Information

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

Representing USF

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

5

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

1/2/15
Meeting Date

Bill Number (if applicable)

Topic UNIVERSITY PERFORMANCE FUNDING

Amendment Barcode (if applicable)

Name WILSON G. BRADSHAW

Job Title PRESIDENT, FLORIDA GULF COAST UNIV.

Address FT. MYERS, FLA
Street

Phone (239) 590-1051

Email PRESIDENT@FGCU.EDU

City

State

Zip

Speaking: ☐ For ☐ Against ☐ Information

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

Representing _____

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

6

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

1/7/15

Meeting Date

Bill Number (if applicable)

Topic Performance Funding-Higher Education

Amendment Barcode (if applicable)

Name John Kelly

Job Title President

Address 555 NW 20th Street
Street

Phone 561-297-3450
~~561-297-3450~~

Boca Raton FL
City State Zip

Email jkelly@faa.edu

Speaking: ☐ For ☐ Against ☒ Information

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

Representing Florida Atlantic University

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)

7

Meeting Date

Bill Number (if applicable)

Topic

Amendment Barcode (if applicable)

Name

Job Title

Address

Street

City

State

Zip

Phone

Email

Speaking:

☐

For

☐

Against

☒

Information

Waive Speaking:

☐

In Support

☐

Against

(The Chair will read this information into the record.)

Representing

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)

APPEARANCE RECORD

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

1/7/2014

Meeting Date

Bill Number (if applicable)

Topic Assessments

Amendment Barcode (if applicable)

Name Layellen ElinJob Title SuperintendentAddress 901 E. Kennedy BlvdPhone 813-272-4047

Street

Tampa

City

Fla

State

33601

Zip

Email

Speaking: ☐ For ☐ Against ☒ InformationWaive Speaking: ☐ In Support ☐ Against
(The Chair will read this information into the record.)Representing Super. of Hills Co Public SchoolsAppearing at request of Chair: ☐ Yes ☒ NoLobbyist 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

9

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

1/7/15
Meeting Date

Bill Number (if applicable)

Topic Assessment

Amendment Barcode (if applicable)

Name JOE JOYNER

Job Title Superintendent

Address 40 Orange St.
Street

Phone 904-669-0888

St. Augustine FL 32084
City State Zip

Email JOE@JOYNER@STJohns.org
K12.FL.US

Speaking: ☐ For ☐ Against ☒ Information

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

Representing Superintendent

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

1/7/15

Meeting Date

Bill Number (if applicable)

Topic ASSESSMENT

Amendment Barcode (if applicable)

Name GARLENZ ANDERSON

Job Title SUPERINTENDENT OF SCHOOLS

Address 45 PARK ST.

Phone

Street

DEERFIELD SPRINGS FL 32435

City

State

Zip

Email

Speaking: ☐ For ☐ Against ☒ Information

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

Representing

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)

APPEARANCE RECORD



1/7/15

Meeting Date

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

Bill Number (if applicable)

Topic

TESTING

Amendment Barcode (if applicable)

Name

Chris Quackenbush

Job Title

Address

Street

9045 Prosperity Way

Phone

239-823-2980

City

K+Myers FL 33913

State

Zip

Email

Speaking:

☐

For

☒

Against

☐

Information

Waive Speaking:

☐

In Support

☐

Against

(The Chair will read this information into the record.)

Representing

Stop Common Core FL . com

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)

12

1.7.15
Meeting Date

Bill Number (if applicable)

Topic FL Public Schools
Instructional Materials

Amendment Barcode (if applicable)

Name Deirdre Clemons

Job Title full-time Mother of 10

Address 110 Siena Way
Street

Phone 309 339 5479

Naples FL 34119
City State Zip

Email clemons6m1@gmail

Speaking: ☐ For ☐ Against ☒ Information

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

Representing ~~parents~~/Collier Citizens Materials Assessment Committee

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)

Did not speak

THE FLORIDA SENATE
APPEARANCE RECORD

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

1/7/2015

Meeting Date

Bill Number (if applicable)

Topic Updates on K-12 assessment requirements, purposes and activities

Amendment Barcode (if applicable)

Name Meredith Mears (like Sears)

Job Title Co-Founder FLParents RISE and parent

Address 3612 Monmouth CT

Phone (850) 321-7258

Street

Tallahassee

FL

32308

Email meredith.flrise@gmail.com

City

State

Zip

Speaking: ☐ For ☐ Against ☒ Information

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

Representing Parents, educators, and students

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)

Did not speak

1/7/15

Bill Number (if applicable)

Amendment Barcode (if applicable)

Job Title Deputy Commissioner of Accountability, Research & Measurement

Phone 850-245-

32399

Email Juan.Copa@fldoe.org

State

Zip

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

Did Not Speak

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

1/2/15
Meeting Date

Bill Number (if applicable)

Topic K-12 TESTING

Amendment Barcode (if applicable)

Name CARL WALDRON

Job Title RETIRED

Address 33221 DARBY TRAIL
Street

Phone 352-678-2056

DADE CITY FL 33525
City State Zip

Email WALDRON.CARL@GMAIL.COM

Speaking: ☐ For ☒ Against ☒ Information

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

TOO MUCH ASSESSMENT/TESTING
Representing POSITIVE COMMUNITY PUBLIC 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

Did not speak

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

1/7/15

Meeting Date

Bill Number (if applicable)

Topic Update on Assessment Requirements

Amendment Barcode (if applicable)

Name Ron Nieto

Job Title Deputy Commissioner for Innovation and Technology

Address 325 W. Gaines Street

Phone 850-245-9855

Street

Tallahassee

FL

32399

Email Ron.Nieto@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

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S-001 (10/14/14)

CourtSmart Tag Report

Room: KN 412

Case:

Caption: Appropriations Subcommittee on Education - 412 Knott 10:00am

Type:
Judge:

Started: 1/7/2015 9:59:27 AM

Ends: 1/7/2015 12:00:57 PM

Length: 02:01:31

9:59:28 AM Call to Order
9:59:35 AM Roll Call
10:00:09 AM Chair Gaetz Comments
10:02:51 AM Tim Elwell, Staff Director, Subcommittee on Education Appropriations
10:04:38 AM Chairman Gaetz
10:04:48 AM Senator Montford, Vice Chairman
10:06:11 AM Senator Galvano
10:06:25 AM Senator Simmons
10:07:40 AM Chairman Gaetz
10:07:57 AM Pam Stewart, Commissioner of Education
10:22:45 AM Chairman Gaetz
10:23:26 AM Senator Montford
10:25:33 AM Pam Stewart, Commissioner of Education
10:28:03 AM Senator Montford
10:28:15 AM Pam Stewart, Commissioner of Education
10:33:13 AM Chairman Gaetz
10:33:24 AM Senator Ring
10:34:11 AM Pam Stewart, Commissioner of Education
10:35:16 AM Chairman Gaetz
10:35:19 AM Senator Bullard
10:36:52 AM Pam Stewart, Commissioner of Education
10:38:19 AM Senator Bullard
10:40:49 AM Senator Bullard
10:41:03 AM Pam Stewart, Commissioner of Education
10:42:05 AM Senator Simmons
10:49:05 AM Pam Stewart, Commissioner of Education
10:51:11 AM Senator Legg
10:53:01 AM Pam Stewart, Commissioner of Education
10:54:57 AM Senator Stargel
10:57:39 AM Chairman Gaetz
10:58:21 AM Vince Verges, Deputy Commissioner of Assessment
10:58:45 AM Senator Montford
10:59:02 AM Vince Verges, Deputy Commissioner of Assessment
11:00:29 AM Chairman Gaetz
11:01:46 AM Pam Stewart, Commissioner of Education
11:06:09 AM Chairman Gaetz
11:09:57 AM Senator Montford
11:14:02 AM Pam Stewart, Commissioner of Education
11:14:42 AM Vince Verges, Deputy Commissioner of Assessment
11:15:23 AM Chairman Gaetz
11:17:15 AM Tom Kuntz, Vice Chair, Board of Governors
11:25:29 AM Dr. Judy Genshaft, President, USF System
11:36:25 AM Dr. Wilson Bradshaw, President, Florida Gulf Coast University
11:41:47 AM Chairman Gaetz
11:41:50 AM Dr. John Kelly, President, Florida Atlantic University
11:46:41 AM Marshall Criser, Chancellor, State University System of Florida
11:50:39 AM Chairman Gaetz
11:51:30 AM Mary Ellen Elia, Superintendent Hillsborough County Schools
11:52:48 AM Joe Joyner, Superintendent
11:55:17 AM Charlene Anderson, Superintendent of Schools
11:57:22 AM Chris Quackenbugh
11:59:57 AM Deirdre Clemons



State Board of Education

Gary Chartrand, *Chair*
John R. Padgett, *Vice Chair*
Members
Ada G. Armas, M.D.
John A. Colon
Marva Johnson
Rebecca Fishman Lipsey
Andy Tuck

Pam Stewart
Commissioner of Education

December 30, 2014

The Honorable Don Gaetz
The Florida Senate
420 Senate Office Building
404 South Monroe Street
Tallahassee, Florida 32399-1100

Dear President Gaetz:

As I have said on numerous occasions, I consider it one of the greatest privileges and most serious responsibilities of my life to serve as Florida's Commissioner of Education, particularly during this time in Florida's history. As a long-time educator, I have loved every job I have had, and hold very dear the students and fellow educators I have come to know over the length of my career. Since I have been Commissioner, my staff and I have had invaluable experiences engaging with parents, students and educators across the state about the things they consider great accomplishments in education and the things that keep them up at night. It is my responsibility to listen to them and to provide dependable and responsive implementation, always with students' interests first. In areas where there are concerns, I address them with the mind and heart of an educator through planning and problem solving, taking every opportunity for collaboration, always doing what is best for each and all of our students.

It is in this spirit that I thank you for your letter of December 1, 2014. I appreciate so very much your acknowledgement of the hard work of my staff and your kind words of support. I am also grateful for any opportunity, including this response, to provide information about the work of the Department and State Board of Education in implementing Governor Scott's roadmap for education and the laws enacted by the Florida Legislature. I have organized my responses to your questions in the order of the topics addressed in your letter.

As I address questions regarding statewide assessments, I believe it is important to begin with section 1008.22, Florida Statutes, which requires all students to participate in all statewide assessments. This is a key requirement in the law that serves in many ways as the spine of our statewide assessment program: it ensures that students are appropriately assessed on the state-adopted content standards in specific grades and courses, always providing options for our students with the most severe disabilities. This is vital in ensuring that all students, regardless of the public school they attend in Florida, receive instruction on our college and career-ready Florida Standards.

Regarding "substitute scores for required assessments," the Florida State Board of Education (State Board) adopted into Rule 6A-1.094223, F.A.C., concordant scores on the SAT and ACT for FCAT 2.0 Grade 10 Reading and a comparative score on the PERT for the Algebra I end-of-course (EOC)

assessment in the summer of 2013. In addition, previous legislative action ensured under s. 1008.22(7) and (8), F.S., that these scores would stay in place for students to continue utilizing until such time as they are replaced by the State Board after the transition to the Florida Standards Assessment.

For industry certification examinations and other national assessments that may substitute for required EOC assessments, to date there are no industry certification examinations that include the EOC core curricular content required by s. 1008.22(3)(b)4., F.S., which I fully support. There are a number of other considerations in adopting other national assessments as alternatives to Florida EOC assessments that I will continue to review.

I am pleased to report that, since s. 1008.22(6), F.S., was amended in 2011, the Department has instituted a variety of technical assistance to school districts regarding local assessments, all of which districts have been making use of based on their own needs. While we will continue to work very closely with individual district leaders and educators, we do have statewide offerings that I am very proud of. The most comprehensive of these is the Florida Item Bank and Test Platform (<https://portal.fldoesso.org/PORTAL/Sign-on/SSO-Home.aspx>). Districts have participated in the development of items, training on the creation and uses of high quality assessments and assessment practices, and in the functionality of the bank itself over the last two years. Beginning last summer districts began using both item bank functions (including integration of test items with local item banks and test delivery platforms), and the test platform where districts create and administer their own local assessments (both in paper-based and computer-based formats) based on their needs. These items are all aligned to Florida Standards and Next Generation Sunshine State Standards, or Frameworks in career and technical education, and each district can create and use assessments for a variety of purposes based on their instructional needs. Districts report that they have replaced older, unaligned student assessments with much improved methods of assessing student progress and mastery of Florida content standards.

In addition, detailed technical assistance documentation on options and best practices for establishing learning growth models on local assessments (available online at <http://www.fldoe.org/teaching/performance-evaluation/student-growth.stml>) and best local assessment development and administration practices (available online at <http://www.fldoe.org/finance/contracts-grants-procurement/american-recovery-reinvestment-act/k-12-strategies/assessment.stml>) have been provided, and our staff continue to fully participate as has been requested by local and regional district assessment workgroups. I am proud that through funding we provided, numbers of school districts worked together to develop high quality items and local assessments that will benefit instruction for students and teachers. These are now available statewide in hard-to-measure subjects such as fine arts, physical education, career and technical education courses and for high enrollment core courses not already covered by state assessments. Assessment is an integral part of effective instruction and student learning, so it is vital that we equip educators with tools that assist them in making the very best use of any assessment that is given to meet this purpose. The amount of professional development and increased shared knowledge among teachers and school leaders about the best use of high quality assessments to improve instruction and student learning on the Florida Standards has increased exponentially through these programs.

Regarding substitute courses for industry certifications, the Department publishes the list of these courses each year; the first list was published under the law in 2013 and a revised list was published for 2014. The Course Code Directory, which is approved by the State Board (<http://www.fldoe.org/core/fileparse.php/5423/urlt/CCDNarrative1415.pdf>), contains a narrative section entitled, "Industry Certification Substitution Information for Mathematics and Science." This includes the code for the course "waiver" as well as a link to those certifications that meet the requirements. The list of industry certifications that could result in college credit through articulation agreements is also available online at <http://www.fldoe.org/core/fileparse.php/5423/urlt/1415icfl.pdf>.

For assessment schedules, information and Department guidance around transition to the new Florida Standards Assessment, we launched the FSA Portal to be a one-stop place where everyone – from students and parents to teachers and district assessment administrators – can find information at <http://www.fsassessments.org/>. This is also the location of the training tests where anyone can take and practice on sample items that give the feel and style of the new assessments in ELA and mathematics. I am enormously proud that we have stayed on track throughout the execution of our transition to the new Florida Standards Assessments, and I am grateful for the hard work of my staff and educators around the state and the support from Governor, State Board and leadership in the legislature that has made that possible.

As you are also likely aware, I am conducting an investigation of standardized assessments and their uses in Florida school districts. While my staff have been able to glean some information from the assessment calendars that each district posts, the law does not require a common format either directly or through State Board rule making authority, so additional information requests to districts have been necessary to obtain comparable information.

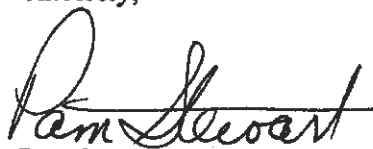
Through a report on the information I am collecting from school districts in this investigation, I intend to provide a clearer picture of the standardized student assessments that are administered, their uses and options, and some common language around student assessment. It is my goal as Commissioner that the content of this report will further knowledge and common understanding for everyone of this critical element of a child's education and how it is used in our schools, and, where possible, include legislative recommendations. While this is the current scope of this report that I expect to release in February, I will continue to pursue any options available, including the ESEA Waiver and any other flexibility available to me, to ensure that we maintain the greatest benefit in our assessment program with the least burden to students and educators.

In other areas of legislation referenced in your letter, the State Board adopted the rule for exemptions for students with medical complexities at its November 2014 meeting. Rule 6A-1.0943, F.A.C., is available online at <https://www.flrules.org/gateway/ruleNo.asp?id=6A-1.0943>. I greatly appreciate the input and support of your staff in reviewing and commenting on the content of this rule prior to its consideration by the State Board, and appreciate the open channels of communication in all of our work.

President Gaetz
December 30, 2014
Page 4

Regarding your final questions, I have been able to implement the laws as they are written with the authority given to me and to the State Board. I am appreciative of the opportunity you have offered in your letter to comment on this and would welcome any advice that you have where you see improvements could be made. Again, I am grateful for your investment in these issues and the opportunity this correspondence affords me to respond to them specifically. I also look forward to meeting with you in person as we have discussed to review my response and continue this invaluable dialogue around the most important topic of educating Florida's students.

Sincerely,

A handwritten signature in black ink, appearing to read "Pam Stewart", with a stylized, flowing script.

Pam Stewart
Commissioner of Education



THE FLORIDA SENATE

Tallahassee, Florida 32399-1100

SENATOR DON GAETZ

1st District

December 1, 2014

The Honorable Pam Stewart
Commissioner of Education
Turlington Building, Suite 1514
325 West Gaines Street
Tallahassee, Florida 32399

Dear Commissioner Stewart:

As the Florida Constitution and Florida law mandate, the State Board of Education (Board) is the chief implementing and coordinating body for public education in Florida charged with supervision of the system of K-12 free public education, as provided by law. Thus, the Board's responsibilities to adopt rules implementing legislation, jointly with your responsibilities as Commissioner, are critical to student success (i.e., standards, progression, assessment, promotion, graduation, preparation for college and career) in public schools.

As we approach the beginning of the second semester of the 2014-2015 school year, I wanted to reach out and express my appreciation for all your and your team's hard work to maintain focus on the Governor's and Legislature's shared goal of academically rigorous education lashed to the realities and opportunities of the economy.

As well, I wish to emphasize in writing what we have previously discussed face-to-face: that there is growing concern and some considerable confusion on the part of many parents, teachers, school board members and superintendents about the impending state-wide and district assessments, the preparation and infrastructure required for those assessments and the consequences that will flow from them.

While resistance to measurement and opposition to performance-based recognition and funding will always exist in some quarters, some of the angst which I and other senators are seeing is coming, at least in part, from longtime advocates and supporters of accountability. And, while there are other questions related to how assessment will impact evaluation of educators, my purpose with this letter is to deal first with issues that affect students and solutions that might help them.

REPLY TO:

- ☐ 4300 Legendary Drive, Suite 230, Destin, FL 32541 (850) 897-5747 FAX: (888) 263-2259
- ☐ 420 Senate Office Building, 404 South Monroe Street, Tallahassee, FL 32399-1100 (850) 487-5001
- ☐ 5230 West U.S. Highway 98, Administration Building, 2nd Floor, Panama City, FL 32401 (850) 747-5856

Senate's Website: www.flsenate.gov

ANDY GARDINER
President of the Senate

GARRETT RICHTER
President Pro Tempore

- *Requires* the Commissioner to identify one or more **comparative scores** for the Algebra I “End-of-Course” (EOC) assessment required for high school graduation. The law also *requires* the Board to adopt comparative scores in rule.
- *Authorizes* the Commissioner to select one or more **nationally developed comprehensive examinations** as equivalent assessment options for students to satisfy state-required EOC assessments including, but not limited to, Advanced Placement (AP), International Baccalaureate (IB), Advanced International Certificate of Education (AICE), or industry-approved, industry certification assessments. For example, when fully implemented, AP and industry certification assessments may substitute for some required EOCs; and student performance on ACT, SAT, industry certification, or other assessments (not limited to just the PERT) may sufficiently substitute as a demonstration of students’ “readiness” for college-level work. The law also *requires* the Board to approve equivalent assessments in rule.
- Local assessments [e.g., s. 1008.22(6), F.S.]. Recent, 2014 legislation [Chapter 2014-23, L.O.F., CS/SB 1642] provided school districts and educators with greater flexibility to identify **local assessments** to measure student mastery of course content for every course. This legislation emphasizes districts’ authority to choose among a variety of assessment options and methods of measuring student performance.

To facilitate district efforts, state law also *requires* the Commissioner to “identify methods to assist and support districts in the development and acquisition of assessments” which may include:

“... developing item banks, facilitating the sharing of developed tests among school districts, acquiring assessments from state and national curriculum-area organizations, and providing technical assistance in best professional practices of test development based upon state-adopted curriculum standards, administration, and security.”

- Substitute courses and industry certifications [e.g., ss. 1002.3105, 1003.01, 1003.4282, 1008.22, and 1008.25, F.S.]. Florida law requires the Commissioner to provide the Board with recommendations regarding courses (and associated assessments) which students may use as **substitute** means for satisfying -- and potentially accelerating through -- grade promotion, high school graduation, and other credit requirements. For example, students may satisfy high school graduation requirements through:
 - **Equivalent, applied, or integrated courses** (or **series of courses**), including **work-related internships** or **apprenticeships** approved by the Board and identified in the course code directory that are available to students to satisfy requirements for a standard diploma.

- **Industry certifications** for which there is a statewide college credit articulation agreement which may substitute for up to two mathematics credits (except for Algebra I and Geometry) and one science credit (except for Biology I). The department is additionally *required* to negotiate state licenses for material and testing for industry certifications to facilitate student access to industry certification options.
- **Assessment exemptions for children with medical complexities** [s. 1008.22, F.S.]. New, 2014 legislation [Chapter 2014-23, L.O.F., CS/SB 1642] provides parents of students with medical complexities options for exempting their children from statewide, standardized assessment requirements, including a one- to three-year exemption approved by the Commissioner. To fully implement all authorized exemptions, including options subject to approval by the Commissioner, the Board *must* adopt rules “which demonstrate the utmost compassion and consideration for meeting the parent’s and child’s needs.”
- **Assessment schedules** [s. 1008.22, F.S.]. The Commissioner is *required* to establish schedules for the administration of assessments, the reporting of student assessment results, and an implementation schedule for transition to Florida’s new statewide, standardized assessments. DOE *must* also annually receive schedules adopted by school boards for any “district-mandated” assessments administered in addition to the statewide, standardized assessments required by the state or locally-selected assessments required as a part of the school accountability system. It is my understanding that, after two years of implementation, DOE’s guidance to districts continues to lack sufficient information and definitions to facilitate consistency and continuity in reporting student assessment data in a manner that is transparent and understandable to parents and helpful to policy makers.
- **Department guidance** [ss. 1000.03 and 1008.22, F.S.]. The Board is responsible for the timely provision of direction, resources, and assistance, intervention, and strong incentives and disincentives to force accountability results. Additionally, recent legislation [Chapter 2014-23, L.O.F., CS/SB 1642] authorized, and in some cases specifically required, the Commissioner and Board to identify, facilitate, and adopt options for use by districts, educators, and students to meet state and local requirements.

To assist in preparing for the 2015 Legislative Session and in order that I and other senators can fully understand and engage with our constituents regarding the Department’s approach to these issues, please respond to this letter, by **December 30, 2014**, with your written responses to the following questions:

1. What is the status of the *statutorily-required* actions, as outlined in this letter?
2. What is the status of *statutorily-authorized* actions, as outlined in this letter? To what extent have *statutorily-authorized* actions been exhausted, and what are your plans for making options available to student and families in time for application in the current school year and subsequent school years? Put simply, has the State Board and Department utilized and implemented full assessment flexibility under existing law and

what has been done to ensure that districts, teachers and parents know about and can exercise those options?

3. What legacy, additional assessments, or assessment systems are currently required or being implemented that are above and beyond the statutorily-required (including statutorily-authorized) assessments or systems? If such assessments or systems exist, please provide the statutory authority and your recommendations and rationale for their continuation or discontinuation.
4. If you lack statutory or regulatory authority to explore or implement other valid options leading to fewer, more reliable, more useful assessments, what additional flexibility, if any, do you need from the Legislature and Governor?

Thank you, Commissioner, for all that you do every day. I am mindful of your many responsibilities and the enormity of the tasks which you have undertaken. I thank you sincerely for your attention to my inquiries, which are on the minds of other legislators, as well, and arise out of our shared commitment to effective teaching and better student performance.

Respectfully,



Senator Don Gaetz

cc: President Gardiner
Gary Chartrand, Chair, State Board of Education