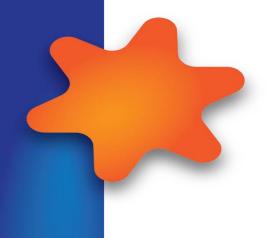
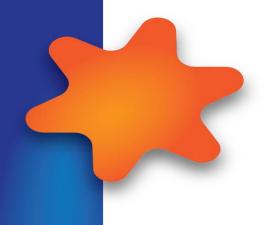


# University of Florida 5 Year Budget Review



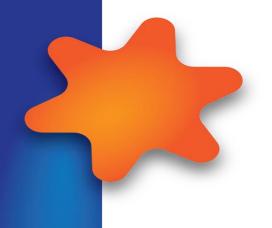
## Year 1 - Changes Implemented 2016-17 Colleges

- General fund revenues (Tuition, State Appropriations) all flow to central administration – then distributed to Colleges
- Colleges receive a significant portion of their revenue as a function of what they do (Tuition & IDC)
- Distribute all (collected/net) tuition using 70/30 teaching/enrollment except for new undergraduate student out of state fee –
   Differentiate tuition from fee
- Tuition revenue determined using terms from CY 2015 (Spring, Summer, Fall 2015)
- Revenues from new undergraduate out of state students (Fall 2015 300 new students = approx. \$3.6m) will establish the Provost Strategic Fund



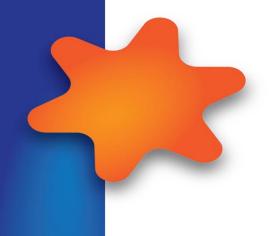
## Year 1 - Changes Implemented 2016-17 Colleges

- State appropriation used to help pay for General Fund Supplement
- Distribute General Fund Supplement to hold harmless for FY 2017 same budget as FY 2016 – with additions for FY 16 raises, Preeminence changes, PO&M
- General Fund Supplement will be the same in future years unless significant or strategic changes occur
- ❖ OH assessed using fixed rates on revenues (GA/IT 10%; 2.15% HSC), Facilities no change – commitment is that support units costs will be managed and controlled to stay within this budgeted revenue stream – significant unfunded mandates may require special assessments



## Year 1 - Changes Implemented 2016-17 Colleges

- Provost in consultation with Sr. VPs sets budgets for Support Units
- Library and Student Services funded by the Provost
- State funded Service Centers and other appropriated units funded by State appropriation
- Other distribution/assessment arrangements stay the same for the upcoming budget year (FY 17)
- Auxiliary unit's budgets lie outside of the general fund but pay tax on expenditures



#### Year 1 - Changes Implemented 2016-17 Sponsored Program Assessment

- Revenue is shared based on a percentage of total accrued IDC to a given unit in the prior year.
- The percentage applied for the Sponsored Program Assessment is not the same for all units. Instead, there are four tiers:
  - Tier 1 (36.8%): High research intensity, high in-unit research infrastructure costs, little or no additional resources to support research infrastructure
  - Tier 2 (49%): High research intensity, high in-unit research infrastructure costs, some additional resources available to support research infrastructure
  - Tier 3 (53.5%): Units with research portfolios that have additional resources to support research infrastructure, lower in-unit research infrastructure costs, or have lower research intensity
  - Tier 4 (75%): Units with little or no research activity; 25% of the returned IDC is reserved in the event that a PI, dept, or center is eligible for returned IDC under UF policy.



#### Year 1 - Changes Implemented 2016-17 Sponsored Program Assessment

- The overall model was required to collect very near the same total amount of assessment as was collected in FY 16, effectively using FY 16 as a baseline
- The individual percentages for each tier were optimized to yield manageable shifts in the assessment within the context of FY 16.
- No change to existing distribution policy for PI's, Departments or Centers
- As the research portfolio grows, this model allows the available resources for central research services supported by SPA (Office of Research, Contracts & Grants, EH&S, Cost Analysis) to increase proportional to IDC growth. In addition, this same group of units will need to be able to withstand fluctuations downward in IDC in any given year.



#### **Year 2 – Items to be Considered**

- Auxiliary Tax
- Graduate Student Waivers
- Facility Tax
- Other Assessment Arrangements
- Dual Degrees 2 diplomas/2 colleges
- Subvention

Task Force Membership?