

MINUTES
STATE UNIVERSITY SYSTEM OF FLORIDA
BOARD OF GOVERNORS
STRATEGIC PLANNING COMMITTEE
FLORIDA STATE UNIVERSITY
TALLAHASSEE, FLORIDA
January 20, 2016

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and its Committees are accessible at <http://www.flbog.edu/>.*

1. Call to Order and Opening Remarks

Governor Dean Colson convened the meeting of the Strategic Planning Committee at 2:05 p.m. on January 20, 2016 with the following members present: Governors Patricia Frost, Richard A. Beard III, Daniel Doyle, Jr., Ned C. Lautenbach, and Edward Morton. A quorum was established. Other Board members present were Governors Thomas G. Kuntz, Tonnette Graham, Morteza Hosseini, H. Wayne Huizenga, Jr., Alan Levine, Wendy Link (entered at 2:52), Pamela Stewart (entered at 2:15 via telephone), Norman D. Tripp, and Fernando J. Valverde.

2. Approval of Committee Minutes, November 5, 2015

Governor Colson called for a motion to approve the minutes from the Committee's November 5, 2015 meeting. A motion was made by Governor Frost, seconded by Governor Morton, and the motion carried unanimously.

3. Higher Education Enrollment Trends and the Board's 2025 Strategic Plan Degree Goals

Chair Colson said that the Committee's next item was with regard to higher education enrollment trends and the Board's 2025 Strategic Plan goals. He reminded the Committee that, at its November 2015 meeting, staff presented projections for degree production, with current projections indicating that the State University System (SUS) is likely to produce 6,000 fewer undergraduate and 1,800 fewer graduate degrees annually than the goal established in the Board's 2025 Strategic Plan. He said that the Committee had further discussed the fact that degrees were being produced by the Florida College System, by private institutions, and through online education. Governor Colson said that this information raised questions as to the growth patterns of all Florida postsecondary education sectors and that, as a result of staff's presentation, the

Committee requested that further information be provided with regard to enrollments and degree production across Florida's higher education sectors. He said that staff were asked to provide answers to three questions:

1. What are the enrollment trends at the SUS regional campuses, joint-use campuses, and special purpose centers; at the Independent Colleges and Universities of Florida; at those institutions under the auspice of the Commission on Independent Education; and at the Florida College System institutions?
2. What factors might be influencing these trends?
3. Does it appear that these trends will impact the Board's 2025 goals for baccalaureate and graduate degree production?

Governor Colson then called on Vice Chancellor Jan Ignash to make a presentation on this subject.

Vice Chancellor Ignash said that her presentation was meant to provide further information that would hopefully be helpful in the Board's future planning. She said that she would be presenting information on enrollment and degree trends for all of Florida's higher education sectors, as well as reviewing in greater detail some of the trends within the SUS itself. Of the three study questions, Dr. Ignash said that enrollment and degree trends, as well as influencing factors would be discussed today. She said that the extent to which these trends might impact the Board's 2025 enrollment and degree goals would require further analysis.

Dr. Ignash began by showing the five-year trend in bachelor's degrees awarded from 2009-10 through 2013-14 for the SUS, the Florida College System (FCS), the Independent Colleges and Universities of Florida (ICUF), and for those institutions under the auspice of the Florida Commission on Independent Education (CIE). She noted that all sectors were growing, that the SUS produced the most baccalaureates by far, and that the FCS is growing at a much faster rate than any of the other sectors. She said that the FCS production of 5,843 baccalaureates in 2013-14 may be able to fill the gap of the predicted 6,000 shortfall in the SUS. Vice Chancellor Ignash next displayed the five-year trend in master's degrees awarded from 2009-10 through 2013-14 for the SUS, ICUF, and CIE institutions. She noted that all sectors were experiencing about the same amount of growth.

Vice Chancellor Ignash then provided a ten-year comparison of degree offerings from 2005-06 through 2015-16 for (1) SUS regional campus bachelor's, (2) SUS regional campus master's, (3) SUS full and partial online bachelor's, (4) SUS full and partial online master's, and (5) FCS bachelor's. Dr. Ignash said that the comparison looked at three kinds of SUS regional campuses: joint-use campuses with an FCS institution; stand-alone, multi-purpose campuses with SUS owned facilities such as the University of South Florida Sarasota-Manatee Campus; and SUS campuses with a special focus

such as hospitality, healthcare, or law. Dr. Ignash identified the University of Central Florida's Rosen School of Hospitality as an example of a special focus campus.

Vice Chancellor Ignash noted that there appears to be a sharp decline in program offerings at regional SUS campuses at both the bachelor's- and master's-level. She noted that there has been a shift from the regional campuses to online formats as well as a substantial growth in baccalaureate degree offerings at the FCS institutions, suggesting that regional access to bachelor's degrees is being met, at least in part, by the FCS. She noted that these data raised the important question of where the SUS is providing access today.

Vice Chancellor Ignash then provided data with regard to five-year trends in instructional activity at SUS main campuses from 2010-11 through 2014-15. She noted that, while there is some variability from campus to campus, the SUS as a whole is experiencing stable instructional activity.

Dr. Ignash next provided data with regard to instructional activity at the SUS's five stand-alone regional campuses that provide a multiple program array: FIU Biscayne Bay, FAU Jupiter, FSU Panama City, USF St. Petersburg, and USF Sarasota/Manatee. She noted that instructional activity is trending downward for each of those campuses. She noted that two of the campuses were accredited by the Southern Association of Colleges and Schools, and that the campuses have anchored their enrollments either through unique programs or by relocating entire colleges. She further noted that residence halls either already exist or are in the planning stages for each site.

Vice Chancellor Ignash then presented a series of charts that illustrated an across the System decline in calculated instructional activity at joint-use campuses shared with a Florida College System institution. She noted that, in most cases, the Florida College System institution has implemented bachelor's degrees. Governor Colson asked why the instructional activity was declining. Dr. Ignash said that when projections were initially made in 2008 the economy was not doing well and that when the economy is not doing well, enrollments tend to increase. She said that, now that the economy is on firmer footing, fewer students appear to be enrolling. She also noted that the Florida College System was drawing from the same population of potential students.

Governor Tripp asked whether online learning was having an impact on enrollments. Dr. Ignash suggested that they might be, but that it was difficult to know the exact extent given the existing data available, because online learning is centrally reported rather than by individual campus. She said that, working with the institutions, it may be possible to capture this information by site. She also noted that it would be useful to analyze instructional activity by region and by broad programmatic areas, as well as to analyze the extent to which a Florida College System in a particular region is offering the same baccalaureate programs as those offered by the SUS institution in that area.

In response to Governor Tripp's question, UCF President John Hitt said that most of the joint-use campuses were not large. He said, further, that some of the enrollments would likely be captured in online learning activity and that, therefore, the joint-use campuses could serve as good "touchpoints" for online students and for students in programs such as UCF's DirectConnect partnership. USF President Genshaft said that she believed that Florida College System institutions were having an impact. She also noted that USF was enrolling a smaller class in order to take in students of higher quality. Governor Tripp asked President Genshaft whether, in that regard, performance-based funding was having an effect, and President Genshaft responded in the affirmative.

Dr. Ignash next presented data on Florida College System baccalaureate enrollment trends in six geographic regions. She noted that baccalaureate enrollments were trending upward in each of the six regions. She then provided trends for online learning instructional activity at each SUS institution, and noted that the activity appeared to be increasing.

Finally, Vice Chancellor Ignash provided the key conclusions, given the data in her presentation. They were that

1. all educational sectors in Florida have experienced growth over the past five years in the number of baccalaureates awarded and that the Florida College System's growth outpaces that of the other sectors,
2. all sectors that award graduate degrees have experienced growth in the number of degrees granted,
3. the majority of SUS main campuses show stable enrollments,
4. SUS joint-use and stand-alone campuses show declining enrollments,
5. online activity shows strong growth, and
6. Florida College System baccalaureates show strong growth.

Dr. Ignash indicated that the next steps would be to further examine enrollments by regions and by broad programmatic areas. Governor Colson asked whether there might be reasons for students to enroll at Florida College System institutions other than associated costs. President Hitt said that, to some extent, the prospective student population associated with Florida College System institutions was placebound. President Genshaft noted that Florida College System institutions were actively recruiting students for their baccalaureate programs.

Governor Morton asked whether enrollments have stabilized at Florida A&M University. Dr. Ignash presented data with regard to instructional activity from 2010-11 to 2014-15 at SUS special focus campuses and noted that instructional activity had trended downward for the Florida A&M Law School during those years. She said that

she expected that enrollments would stabilize on the Florida A&M main campus. Governor Levine expressed the same opinion.

Governor Morton said that the SUS should be assessing the real needs of business at all degree levels and that needless programmatic redundancies should be eliminated. He said that Florida needed to systemically determine its overall degree array so that Florida would become the prime destination in the United States for new companies or for those seeking to relocate. Governor Colson said that Florida needed to have a more highly educated population irrespective of which institutions were granting the degrees. Governor Kuntz expressed his agreement with both Governors Morton and Colson. He referenced the good work that had been done by the Access and Attainment Commission and said that he would be disappointed if that work were to be shelved.

Chancellor Criser said that the Board was now taking yearly looks at graduate outcomes and job demands compared to degrees produced, particularly in Programs of Strategic Emphasis. He said that the Board's emphasis should be on both the provision of access as well as ensuring that the System was producing graduates with the knowledge, skills, and degrees that employers need. Dr. Ignash reminded the Board that the Access and Attainment Commission's gap analysis was a prospective analysis, while the graduate follow-up study was retrospective. She said that both were important and necessary.

Governor Tripp noted that recent years have seen online learning increasing in ways that couldn't have been expected. He said, further, that it was his opinion that a complete partnership between the State University System and the Florida College System had yet to be accomplished.

Governor Colson thanked staff for their provision of information and indicated that it was important that the Strategic Planning Committee continue to explore the issues that were presented.

4. Concluding Remarks and Adjournment

There being no further business to come before the Committee, the meeting was adjourned at 2:57 p.m.

R.E. LeMon,
Associate Vice Chancellor,
Academic and Student Affairs

Dean Colson, Chair