FALL PROVOST’S RETREAT

AUGUST 23, 2019
Welcome
INTRODUCTION

Provost Tayloe Harding
Interim Executive Vice President for Academic Affairs and Provost
WELCOMING REMARKS

Bob Caslen
President

UNIVERSITY OF
South Carolina
WELCOMING REMARKS AND ACADEMIC AFFAIRS UPDATE

Provost Tayloe Harding
Interim Executive Vice President for Academic Affairs and Provost
FALL 2019 ENROLLMENT UPDATE

Scott Verzyl
Associate Vice President for Enrollment Management
Dean of Undergraduate Admissions

Fall 2019 Provost’s Retreat August 23, 2019
SYSTEM OVERVIEW

Flagship Institution - USC Columbia

Comprehensive Campuses
USC Aiken USC Beaufort USC Upstate

Palmetto College
USC Lancaster, USC Salkehatchie USC Sumter, USC Union

School of Medicine Columbia Greenville
<table>
<thead>
<tr>
<th>Year</th>
<th>Total Enrollment</th>
<th>Undergraduate</th>
<th>Graduate</th>
<th>Professional</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fall 2018</td>
<td>42,883</td>
<td>36,176</td>
<td>6,707</td>
<td>1,849</td>
</tr>
<tr>
<td>Fall 2017</td>
<td>42,394</td>
<td>36,481</td>
<td>6,922</td>
<td>1,814</td>
</tr>
<tr>
<td>Fall 2016</td>
<td>41,155</td>
<td>34,554</td>
<td>7,198</td>
<td>1,746</td>
</tr>
<tr>
<td>Fall 2015</td>
<td>40,510</td>
<td>34,200</td>
<td>7,241</td>
<td>1,697</td>
</tr>
<tr>
<td>Fall 2014</td>
<td>39,682</td>
<td>34,075</td>
<td>6,871</td>
<td>1,613</td>
</tr>
<tr>
<td>Fall 2013</td>
<td>38,627</td>
<td>33,631</td>
<td>6,519</td>
<td>1,526</td>
</tr>
</tbody>
</table>
FALL 2019*
PROJECTING OVER 8,700
NEW UNDERGRADUATE STUDENTS

- Freshman 6250
- Transfers 1350
- Non-Degree 400
- System Transfers 300
- Gamecock Gateway/Palmetto Pathway 400

*preliminary as of 8/12/19
TEN-YEAR TREND SAT AVERAGE AND FRESHMAN CLASS SIZE
CLASS SIZE AND ACT TRENDING UPWARD

Ten Year Trend - ACT Average and Freshman Class Size

ACT Avg
Enrollment
FALL 2019 ENROLLMENT FUNNEL

- Prospects: 344,475
- Inquiries: 140,350 (41%)
- Applicants: 31,278 (30%)
- Admits: 21,468 (69%)
- Deposits: 6,600 (31%)
- Enrollees: 6,250 (95%)
APPLICATIONS BY RESIDENCY

Ten-Year Application Trend

- Total
- Non Resident
- SC Resident

2010: 8,385 (Non Resident), 8,858 (SC Resident), 16,243 (Total)
2011: 9,130 (Non Resident), 9,090 (SC Resident), 18,220 (Total)
2012: 13,965 (Non Resident), 13,759 (SC Resident), 27,724 (Total)
2013: 14,658 (Non Resident), 9,059 (SC Resident), 23,717 (Total)
2014: 16,847 (Non Resident), 9,694 (SC Resident), 26,541 (Total)
2015: 16,383 (Non Resident), 10,514 (SC Resident), 26,997 (Total)
2016: 16,319 (Non Resident), 10,524 (SC Resident), 26,843 (Total)
2017: 20,369 (Non Resident), 20,754 (SC Resident), 41,123 (Total)
2018: 30,883 (Non Resident), 10,514 (SC Resident), 41,397 (Total)
2019*: 31,278 (Non Resident), 10,524 (SC Resident), 41,802 (Total)

*Data for 2019 is preliminary.
## 2019 INCOMING CLASS PROFILE*

<table>
<thead>
<tr>
<th></th>
<th>All Freshmen</th>
<th>Capstone Scholars</th>
<th>Honors College</th>
<th>Gateway</th>
<th>Palmetto Pathway</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number</td>
<td>6250</td>
<td>1550</td>
<td>594</td>
<td>360</td>
<td>49</td>
</tr>
<tr>
<td>Avg. SAT</td>
<td>1273</td>
<td>1372</td>
<td>1473</td>
<td>1017</td>
<td>1012</td>
</tr>
<tr>
<td>Avg. ACT</td>
<td>28</td>
<td>30.8</td>
<td>33</td>
<td>18.8</td>
<td>19.7</td>
</tr>
<tr>
<td>GPA</td>
<td>4.1</td>
<td>4.4</td>
<td>4.8</td>
<td>3.2</td>
<td>3.2</td>
</tr>
</tbody>
</table>

*projected/unofficial
MORE ABOUT THE FRESHMAN CLASS

• Madison and John – Most popular names
• 51% from South Carolina
• 55% Female
• 18% URM
• 38 sets of twins
• 79 Valedictorians
• 1700+ high schools represented
• 43 states and territories, including District of Columbia and 40 countries

Preliminary as of 8/14/19
## Freshman Class Top 10 States 2019

<table>
<thead>
<tr>
<th>North Carolina</th>
<th>New York</th>
</tr>
</thead>
<tbody>
<tr>
<td>Georgia</td>
<td>Pennsylvania</td>
</tr>
<tr>
<td>New Jersey</td>
<td>Massachusetts</td>
</tr>
<tr>
<td>Virginia</td>
<td>Ohio</td>
</tr>
<tr>
<td>Maryland</td>
<td>Illinois</td>
</tr>
</tbody>
</table>
SERVING MORE SC STUDENTS THAN EVER BEFORE

South Carolina High School Graduates Served on Columbia Campus Fall 2010 - Fall 2019

4,000 9.0%

Fall 2010 2,515
Fall 2011 2,585
Fall 2012 2,618
Fall 2013 2,737
Fall 2014 2,793
Fall 2015 2,892
Fall 2016 2,893
Fall 2017 3,119
Fall 2018 3,587
Fall 2019* 3,624

Total SC Residents Served

% of All Graduates
## 2019 FRESHMAN CLASS TOP MAJORS

<table>
<thead>
<tr>
<th>Biological Sciences</th>
<th>Exercise Science</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Nursing</td>
<td>Psychology</td>
</tr>
<tr>
<td>Pre-International Business</td>
<td>Finance</td>
</tr>
<tr>
<td>Undeclared</td>
<td>Public Health</td>
</tr>
<tr>
<td>Business Undeclared</td>
<td>Computer Science</td>
</tr>
<tr>
<td>Sport and Entertainment Management</td>
<td>Marketing</td>
</tr>
<tr>
<td>College of Arts and Sciences</td>
<td>35%</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-----</td>
</tr>
<tr>
<td>Darla Moore School of Business</td>
<td>18%</td>
</tr>
<tr>
<td>College of Engineering and Computing</td>
<td>16%</td>
</tr>
<tr>
<td>Arnold School of Public Health</td>
<td>9%</td>
</tr>
<tr>
<td>College of Nursing</td>
<td>8%</td>
</tr>
<tr>
<td>College of Information and Communications</td>
<td>4%</td>
</tr>
<tr>
<td>College of Hospitality, Retail, Sport Management</td>
<td>3%</td>
</tr>
<tr>
<td>College of Pharmacy</td>
<td>3%</td>
</tr>
<tr>
<td>College of Education</td>
<td>2%</td>
</tr>
<tr>
<td>School of Music</td>
<td>2%</td>
</tr>
<tr>
<td>College of Social Work</td>
<td>1%</td>
</tr>
</tbody>
</table>
Residential bridge program focused on SC Residents

- Partnership program between the University of South Carolina and Midlands Technical College
- Take classes at Midlands Technical College in Columbia
- One year invitation-only program
- Complete 30 hours and earn a minimum 2.25 to transfer
- Must apply as a first-time fall freshman to USC to be considered
- In Fall 2019, over 97% of SC applicants were invited to USC via freshman class or Gamecock Gateway.

Named Bronze Winner for 2015 NASPA’s Excellence Award!

NASPA is the leading association for the advancement, health, and sustainability of the student affairs profession.
## PERCENTAGE OF STUDENTS RECEIVING AID, UOFSC COLUMBIA

<table>
<thead>
<tr>
<th>Category</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent of Entering Freshmen Receiving Financial Aid</td>
<td>96%</td>
</tr>
<tr>
<td>Percent of Entering Freshmen Receiving Need-Based Financial Aid</td>
<td>54%</td>
</tr>
<tr>
<td>Percent of Continuing Undergraduates Receiving Financial Aid</td>
<td>90%</td>
</tr>
<tr>
<td>Percent of Continuing Students Receiving Need-Based Financial Aid</td>
<td>46%</td>
</tr>
<tr>
<td>Percent of Undergraduate Students Receiving Financial Aid</td>
<td>91%</td>
</tr>
<tr>
<td>Percent of Undergraduate Students Receiving Need-Based Financial Aid</td>
<td>49%</td>
</tr>
<tr>
<td>Percent of Graduate/Professional Students Receiving Financial Aid</td>
<td>89%</td>
</tr>
<tr>
<td>Percent of All Students Receiving Financial Aid</td>
<td>91%</td>
</tr>
</tbody>
</table>

Source: [https://sc.edu/about/offices_and_divisions/financial_aid/forms_and_resources/factbooks/accessible_factbooks/1718/factbook_percentages_of_students_receiving_financial_aid_and_average_awards_1718.xlsx](https://sc.edu/about/offices_and_divisions/financial_aid/forms_and_resources/factbooks/accessible_factbooks/1718/factbook_percentages_of_students_receiving_financial_aid_and_average_awards_1718.xlsx)
### ADJUSTED GROSS FAMILY INCOME
#### FALL 2018 ALL STUDENTS

<table>
<thead>
<tr>
<th>Adjusted Gross Family Income</th>
<th>All Students</th>
<th>SC Resident</th>
<th>Out-of-State</th>
</tr>
</thead>
<tbody>
<tr>
<td>$0-49,999</td>
<td>18.2%</td>
<td>27.2%</td>
<td>6.9%</td>
</tr>
<tr>
<td>$50,000-99,999</td>
<td>14.4%</td>
<td>19.3%</td>
<td>8.1%</td>
</tr>
<tr>
<td>$100,000-249,000</td>
<td>26.1%</td>
<td>25.4%</td>
<td>27.2%</td>
</tr>
<tr>
<td>$250,000-499,999</td>
<td>6.0%</td>
<td>3.1%</td>
<td>9.8%</td>
</tr>
<tr>
<td>$500,000-749,999</td>
<td>.8%</td>
<td>.4%</td>
<td>1.3%</td>
</tr>
<tr>
<td>$750,000-999,999</td>
<td>.3%</td>
<td>.1%</td>
<td>.5%</td>
</tr>
<tr>
<td>$1,000,000+</td>
<td>.2%</td>
<td>.1%</td>
<td>.3%</td>
</tr>
<tr>
<td>Not Reported</td>
<td>33.7%</td>
<td>24.4%</td>
<td>45.9%</td>
</tr>
<tr>
<td>Total</td>
<td>27,002</td>
<td>15,182</td>
<td>11,820</td>
</tr>
</tbody>
</table>
FALL 2018 INCOMING FRESHMAN AID
BY SOURCE AND TYPE

Aid by Source
- State: $16,603,246
- Institutional: $11,304,250
- External (Private Loans): $10,134,464
- Federal: $33,212,092

Aid by Type
- Scholarships: $22,038,696
- Loans: $28,911,399
- Federal Work-Study: $228,160
- Grants: $5,859,765

South Carolina
AVERAGE UNDERGRADUATE STUDENT LOAN DEBT AT GRADUATION
AVERAGE DOLLARS BORROWED

Source: Internal Student Debt Study Data, [https://ticas.org/](https://ticas.org/)
PROFILE OF 2018 COHORT
162 Recipients
1. Average family income: $18,725
2. Gender: 62% Female
3. Race:
   • White (40%)
   • Black (25%)
   • Two or More Races (21%)
   • Other (14%)

PERCENT OF GIFT AID
• 93% Gamecock Guarantee
• 63% Overall Resident Freshmen

AVERAGE RETENTION
2008 TO 2018
FRESHMAN TO SOPHOMORE
• 90% Gamecock Guarantee
• 88% USC Columbia Overall

Status of Recipients 2008-2018

Top 3 Counties
1. Richland
2. Horry
3. Greenville

36 out of 46 counties represented
Average Undergraduate Student Loan Debt at Graduation
Percentage of Undergraduate Students with Student Loan Debt at Graduation

<table>
<thead>
<tr>
<th>Class of 2012</th>
<th>Class of 2013</th>
<th>Class of 2014</th>
<th>Class of 2015</th>
<th>Class of 2016</th>
<th>Class of 2017</th>
</tr>
</thead>
<tbody>
<tr>
<td>55%</td>
<td>59%</td>
<td>60%</td>
<td>60%</td>
<td>60%</td>
<td>58%</td>
</tr>
<tr>
<td>52%</td>
<td>53%</td>
<td>54%</td>
<td>55%</td>
<td>54%</td>
<td>54%</td>
</tr>
</tbody>
</table>

Percentage of Students with Student Loan Debt at Graduation - National
Percentage of Students with Student Loan Debt at Graduation - SC
Percentage of Students with Student Loan Debt at Graduation - USC Columbia

Source:
https://www2.ed.gov/offices/OSFAP/default-management/cdr.html
AVERAGE UNDERGRADUATE STUDENT LOAN DEBT AT GRADUATION
AVERAGE DOLLARS BORROWED, UOFSC COLUMBIA

Source: Internal Student Debt Study
FIRST-TIME, FULL-TIME FRESHMAN RETENTION RATES

Freshman to Sophomore return rate for the following fall.

Data retrieved from Institutional Research Assessment, and Analytics July 30, 2019.
www.ipr.sc.edu/
# First Year Retention Rates

**2017 Cohort**

<table>
<thead>
<tr>
<th>SEC Schools</th>
<th>First Year Retention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanderbilt University</td>
<td>97%</td>
</tr>
<tr>
<td>University of Florida</td>
<td>96%</td>
</tr>
<tr>
<td>University of Georgia</td>
<td>95%</td>
</tr>
<tr>
<td>Clemson University</td>
<td>93%</td>
</tr>
<tr>
<td>Auburn University</td>
<td>92%</td>
</tr>
<tr>
<td>Texas A&amp;M University</td>
<td>92%</td>
</tr>
<tr>
<td><strong>University of South Carolina</strong></td>
<td><strong>88%</strong></td>
</tr>
<tr>
<td>University of Missouri</td>
<td>87%</td>
</tr>
<tr>
<td>The University of Alabama</td>
<td>87%</td>
</tr>
<tr>
<td>The University of Tennessee</td>
<td>86%</td>
</tr>
<tr>
<td>University of Mississippi</td>
<td>85%</td>
</tr>
<tr>
<td>Louisiana State University</td>
<td>83%</td>
</tr>
<tr>
<td>University of Kentucky</td>
<td>83%</td>
</tr>
<tr>
<td>University of Arkansas</td>
<td>82%</td>
</tr>
<tr>
<td>Mississippi State University</td>
<td>79%</td>
</tr>
</tbody>
</table>

Source: IPEDS Data Center  
[https://nces.ed.gov/ipeds/](https://nces.ed.gov/ipeds/)
FIRST-TIME, FULL-TIME FRESHMAN GRADUATION RATES

Data retrieved from Institutional Research Assessment, and Analytics July 30, 2019.
www.ipr.sc.edu/
# SIX YEAR GRADUATION RATES
## (2011 COHORT)

<table>
<thead>
<tr>
<th>SEC Schools</th>
<th>Six Year Graduation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vanderbilt University</td>
<td>92%</td>
</tr>
<tr>
<td>University of Florida</td>
<td>88%</td>
</tr>
<tr>
<td>University of Georgia</td>
<td>85%</td>
</tr>
<tr>
<td>Texas A&amp;M University</td>
<td>82%</td>
</tr>
<tr>
<td>Clemson University</td>
<td>82%</td>
</tr>
<tr>
<td>Auburn University</td>
<td>77%</td>
</tr>
<tr>
<td><strong>University of South Carolina</strong></td>
<td><strong>75%</strong></td>
</tr>
<tr>
<td>University of Tennessee</td>
<td>70%</td>
</tr>
<tr>
<td>University of Missouri</td>
<td>69%</td>
</tr>
<tr>
<td>University of Alabama</td>
<td>68%</td>
</tr>
<tr>
<td>Louisiana State University</td>
<td>67%</td>
</tr>
<tr>
<td>University of Kentucky</td>
<td>65%</td>
</tr>
<tr>
<td>University of Arkansas</td>
<td>62%</td>
</tr>
<tr>
<td>University of Mississippi</td>
<td>60%</td>
</tr>
<tr>
<td>Mississippi State</td>
<td>58%</td>
</tr>
</tbody>
</table>

Source: IPEDS Data Center
https://nces.ed.gov/ipeds/
Total UofSC System Enrollment
Fall 2018

- White: 35,222 (68%)
- Black or African American: 7,413 (14%)
- Asian: 1,354 (3%)
- Hawaiian or Pacific Islander: 55 (0%)
- Hispanic: 2,396 (5%)
- N/R Alien: 2,144 (4%)
- Unknown: 846 (2%)
- Two or More Races: 1,900 (4%)
- American Indian/Alaska Native: 109 (0%)

Data retrieved from www.jpr.sc.edu/Table Generator
### Projected Change in US Public High School Graduates By Race

#### 2015 - 2024

<table>
<thead>
<tr>
<th>Academic Year</th>
<th>Native American</th>
<th>Asian</th>
<th>Black</th>
<th>Hispanic</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td>2015-2016</td>
<td>31,684</td>
<td>186,448</td>
<td>414,653</td>
<td>602,242</td>
<td>1,699,256</td>
</tr>
<tr>
<td>2024-2025</td>
<td>38,152</td>
<td>261,979</td>
<td>443,882</td>
<td>807,087</td>
<td>1,639,604</td>
</tr>
<tr>
<td>Change</td>
<td>+6,468</td>
<td>+75,531</td>
<td>+29,229</td>
<td>+204,845</td>
<td>-59,652</td>
</tr>
</tbody>
</table>

Source: WICHE
SC High School Graduate Projections
Total Students 2010-2032

+8%
(2018-2026)

Source: WICHE
SC African American HS Graduate Projections 2010-2032

Source: WICHE
## WHY STUDENTS ATTEND COLLEGE

<table>
<thead>
<tr>
<th>Reason</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>To be able to get a better job</td>
<td>85</td>
</tr>
<tr>
<td>To learn more about things that interest me</td>
<td>84</td>
</tr>
<tr>
<td>To get training for a specific career</td>
<td>78</td>
</tr>
<tr>
<td>To gain a general education and appreciation of ideas</td>
<td>76</td>
</tr>
<tr>
<td>To be able to make more money</td>
<td>70</td>
</tr>
<tr>
<td>To prepare for graduate/professional school</td>
<td>60</td>
</tr>
<tr>
<td>To make me a more cultured person</td>
<td>51</td>
</tr>
</tbody>
</table>

% of students that considered the reason "very important" in deciding to go to college.

The American Freshman National Norms (CIRP) 2017
### USC COLUMBIA ENROLLMENT SUMMARY

<table>
<thead>
<tr>
<th>Category</th>
<th>2009</th>
<th>2019*</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freshman Applications</td>
<td>17,438</td>
<td>31,278</td>
<td>+13,840 (+79%)</td>
</tr>
<tr>
<td>Freshman Class</td>
<td>3,881</td>
<td>6,250</td>
<td>+2369 (+61%)</td>
</tr>
<tr>
<td>Freshman Class Yield</td>
<td>34.8%</td>
<td>29.1%</td>
<td>-5.7 percentage pts.</td>
</tr>
<tr>
<td>Average SAT</td>
<td>1192</td>
<td>1273</td>
<td>+81 points</td>
</tr>
<tr>
<td>Average ACT</td>
<td>26.1</td>
<td>28</td>
<td>+1.9 points</td>
</tr>
<tr>
<td>Freshman Honors Enrollment</td>
<td>321</td>
<td>600</td>
<td>+279 (+87%)</td>
</tr>
<tr>
<td>Capstone Scholars Enrollment</td>
<td>483</td>
<td>1,550</td>
<td>+1067 (+221%)</td>
</tr>
<tr>
<td>Total Undergrad Enrollment</td>
<td>20,494</td>
<td>27,500</td>
<td>+ 7006 (+34.2%)</td>
</tr>
<tr>
<td>First to Second Year Retention</td>
<td>85.9%</td>
<td>88.7%</td>
<td>+2.8 percentage pts.</td>
</tr>
<tr>
<td>4-Year Graduation Rate*</td>
<td>54.7%</td>
<td>58.0%</td>
<td>+3.3 percentage pts.</td>
</tr>
<tr>
<td>6-Year Graduation Rate*</td>
<td>72.3%</td>
<td>74.2%</td>
<td>+1.9 percentage pts.</td>
</tr>
</tbody>
</table>

*projected as of July 2019
ENROLLMENT MANAGEMENT IS ONE BIG PUZZLE...
MEET GENERATION Z
THE TOUCH-SCREEN GENERATION
What's this technology doing to toddlers' brains?
By Hanna Rosin
ARE YOU READY FOR THE NEXT GENERATION OF STUDENTS?

Sasha Obama

Thylane Blondeau

Finn Wolfhard

Caleb McLaughlin

Gaten Matarazzo

Jaden Agassi

Jazz Jennings

Billie Eilish

Li'l Pump

Frankie Jonas

Millie Bobby Brown

Willow Smith
The Mindset of Our Students

• Since they binge-watch their favorite TV shows, they might like to binge-watch the video portions of their courses too.
• When they see wire-rimmed glasses, they think Harry Potter, not John Lennon.
• “Press pound” on the phone is now translated as “hit hashtag.”
• Celebrity “selfies” are far cooler than autographs.
• There has always been a national database of sex offenders.

• The Daily Show with Jon Stewart has always been the only news program that really “gets it right.”
• Women have always been dribbling, and occasionally dunking, in the WNBA.
• Ads for prescription drugs, noting their disturbing side effects, have always flooded the airwaves.
• “Good feedback” means getting 30 likes on your last Facebook post in a single afternoon.
• Hong Kong has always been part of China.

Source: Beloit Mindset List

UofSC South Carolina
CHARACTERISTICS

• 1996 – 2011
• 60 million strong
• Digital Natives
• Small Windows of Interest (8 second)
• Aware of their Social Media Presence
• Pragmatic
• Accepting of Identity

• Most Diverse
• Debt Averse
• Want to Make an Impact
• Ambitious/Career Focus
• Wary of “Establishment”
• Expect Authority Figures to be Coaches and Collaborators
• Value Applied Education

ADDITIONAL CHARACTERISTICS

• 1 in 10 incoming freshmen plan to participate in student protest (HERI)

• 15%+ of minority students report feeling “unsafe” on campuses (NSSE)

• Increased usage of Counseling and Psychology

• Increased reporting of suicidal ideation

• Increased reports of disruptive behavior in the classroom

• - Ellis, 2017
ADDITIONAL CHARACTERISTICS

• Increased exposure to medication (both prescribed and illicit)
• Increased reliance on Behavior Management Medication
• Increased use of marijuana as drug of choice
• Parents continue to play a big role in students’ lives beyond high school

- Ellis, 2017
IMPLICATIONS

• Social Media and Internet are viewed as reliable sources of fact

• Expect to receive information rapidly…if delayed students are less likely to trust the reliability of information and/or are more likely to accept rumors as truth

• Trend toward use of snapchat/secret/whisper because information is deleted rapidly…hard to know what information is being released

- Ellis, 2017
IMPLICATIONS

• Students are less interested in working within a system or process to create solutions and often blame the system (establishment) for problems that exist

• Expect demands to be met immediately and lack patience to work through change

• Often do not bring solutions to problems to the table and/or the demands they bring are unreasonable

- Ellis, 2017
IMPLICATIONS

• Due to limited attention span, it is hard to engage students in a meaningful dialogue/conversation or get them to commit to a long-term plan

• Approach the world with an expectation that they will make a difference (and they will get credit for it)

• Parents often “come to the rescue” if a student is met with a challenge or obstacle
IMPLICATIONS

• Approach college as a consumer with consumer like demands and may be less likely to pursue a college if perceived as a “bad value,” not affordable, or not meeting their expectations

• Highly competitive and the individual good is seen as more important than the societal good

- Ellis, 2017
IMPLICATIONS

• Expect to see, speak to and interact directly with university presidents

• Quick to dismiss authority figures if that person is perceived as part of the system or part of the problem

• Quick to use stigmas to label others who are perceived to not agree with their viewpoint (i.e. sexist, racist, ageist, etc.)

- Ellis, 2017
Help us create a safe, civil, and non-discriminatory learning environment by promoting the Carolinian Creed.
FOR MORE INFORMATION CONTACT:

R. Scott Verzyl
Dean of Undergraduate Admissions
Associate Vice President for Enrollment Management
Scott.Verzyl@sc.edu
(803) 777-6922
SACS ACCREDITATION
SACSCOC UPDATE AUGUST 2019

Donald Miles
Director of Institutional Effectiveness and Accreditation
SACSCOC Liaison

UNIVERSITY OF South Carolina
REQUIREMENTS

- Compliance Certification
- Quality Enhancement Plan
- Substantive Change Reporting
SACSCOC REVIEW PROCESS

Off-Site Review

On-Site Review

Review by SACSCOC Board of Trustees
MULTI-LAYERED SACSCOC REVIEW PROCESS

- Leadership Orientation by SACSCOC Staff
- Compliance Certification Report
- Off-Site Committee Review and Report
- Quality Enhancement Plan
- Institutional Focused Report
- On-Site Committee Visit and Report
- Institutional Response Report and revised QEP
- Review and Action by the SACSCOC Board of Trustees
<table>
<thead>
<tr>
<th>Event</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Orientation of Leadership Teams</td>
<td>December 8-11, 2018</td>
</tr>
<tr>
<td>Compliance Certification Due</td>
<td>September 14, 2020</td>
</tr>
<tr>
<td>Off-Site Peer Review Conducted</td>
<td>November 7-10, 2020</td>
</tr>
<tr>
<td>SACSCOC VP Advisory Visit</td>
<td>November 19-20, 2020 (Holding)</td>
</tr>
<tr>
<td>On-Site Peer Review Conducted</td>
<td>March 22-25, 2021</td>
</tr>
<tr>
<td>Review by the SACSCOC Board of Trustees</td>
<td>December 8-11 2021</td>
</tr>
<tr>
<td>Member Name</td>
<td>Name</td>
</tr>
<tr>
<td>---------------------</td>
<td>---------------------</td>
</tr>
<tr>
<td>Tayloe Harding</td>
<td>Tena Crews</td>
</tr>
<tr>
<td>Donald Miles</td>
<td>Ed Walton</td>
</tr>
<tr>
<td>Caroline Agardy</td>
<td>Doug Foster</td>
</tr>
<tr>
<td>Susan Elkins</td>
<td>Cheryl Addy</td>
</tr>
<tr>
<td>Sandra Kelly</td>
<td>Cantey Heath</td>
</tr>
<tr>
<td>Terry Parham</td>
<td>Tom McNally</td>
</tr>
<tr>
<td>Dennis Pruitt</td>
<td>Sabrina Andrews</td>
</tr>
</tbody>
</table>
## SACSCOC Standards by Grouping

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1, 2, 3</td>
<td>Integrity, Mission, Basic Eligibility Standards</td>
</tr>
<tr>
<td>4</td>
<td>Governing Board</td>
</tr>
<tr>
<td>5</td>
<td>Administration and Organization</td>
</tr>
<tr>
<td>6</td>
<td>Faculty</td>
</tr>
<tr>
<td>7</td>
<td>Institutional Planning and Effectiveness</td>
</tr>
<tr>
<td>8</td>
<td>Student Achievement</td>
</tr>
<tr>
<td>9</td>
<td>Educational Program Structure and Content</td>
</tr>
<tr>
<td>10</td>
<td>Educational Policies, Procedure, and Practices</td>
</tr>
<tr>
<td>11</td>
<td>Library and Learning/Information Resources</td>
</tr>
<tr>
<td>12</td>
<td>Academic and Student Support Services</td>
</tr>
<tr>
<td>13</td>
<td>Financial and Physical Resources</td>
</tr>
<tr>
<td>14</td>
<td>Transparency and Institutional Representation</td>
</tr>
</tbody>
</table>
### TOP 10 MOST FREQUENTLY CITED PRINCIPLES 2018

#### Review Stage I: OFF-Site Committee (n=75)

<table>
<thead>
<tr>
<th>Rank</th>
<th>Requirement/Standard</th>
<th>% of Institutions in Non-Compliance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>3.7.1 (Faculty Competence)</td>
<td>99%</td>
</tr>
<tr>
<td>2.</td>
<td>3.3.1.3 (IE – Educational Support)</td>
<td>60%</td>
</tr>
<tr>
<td>3.</td>
<td>3.3.1.2 (IE – Administrative Units)</td>
<td>51%</td>
</tr>
<tr>
<td>4.</td>
<td>3.3.1.5 (IE – Community/Public Service)</td>
<td>51%</td>
</tr>
<tr>
<td>5.</td>
<td>3.3.1.1 (IE – Educational Programs)</td>
<td>49%</td>
</tr>
<tr>
<td>6.</td>
<td>2.11.1 (Financial Resources)</td>
<td>44%</td>
</tr>
<tr>
<td>7.</td>
<td>2.8 (Faculty)</td>
<td>43%</td>
</tr>
<tr>
<td>8.</td>
<td>3.7.2 (Faculty Evaluation)</td>
<td>36%</td>
</tr>
<tr>
<td>9.</td>
<td>3.4.11 (Academic Program Coordination)</td>
<td>32%</td>
</tr>
<tr>
<td>10.</td>
<td>3.5.4 (Terminal Degrees of Faculty)</td>
<td>32%</td>
</tr>
</tbody>
</table>

#### Key Descriptive Statistics
(Number of Principles Cited Per Institution)

- **Mean=15.4** (SD=8.1)
- **Median=14**
- **Range=43**

#### Selected General Areas of Non-Compliance

- Governance and Administration (1.1, 1.2-3, 2.6, 3.2, 3.13-14, 4.3-4.13.3) | 21%
- Faculty (2.8, 3.4.11, 3.5.4, 3.7) | 18%
- Institutional Effectiveness (2.4, 2.5, 3.1.1, 3.3.1, 4.1) | 18%
- Educational Programs/Curriculum (2.7, 3.4.6, 3.12.1, 4.2, 4.4, 4.9) | 17%
- Financial and Physical Resources (2.11, 3.10, 3.11.4.7) | 14%
- Student Services/Learning Support (2.9, 2.10, 3.4.9, 3.4.12, 3.8, 3.9, 3.13.3, 4.5, 4.6, 4.8) | 12%
UOFSC SACSCOC UPDATE

Group 4
Governing Board

Group 6
Faculty

Group 7
Institutional Planning and Effectiveness

Group 8
Student Achievement

Group 12
Academic and Student Support Services
4.2a – Minor revisions to Columbia, regional PC campuses, System mission statements.

Proposed new Board policy for regular review of campus mission statements.

4.2g – Launched BOT self evaluation in 2018.

4.2f - BOT Chairman responded to SACSCOC request for information July, 26th. Awaiting SACSCOC response.
HIGHLIGHTS CONTINUED

• 12.6 – Drafted a response to this new financial aid standard and University has a program in place to help students manage their debt and repay their loans.

• 7.3 – Working with administrative units to develop blueprints.

• 8.2.a – Launched a new 2yr assessment cycle for academic program assessment. Review and provide feedback for 300+ programs.

• 6 – OIRAA staff coordinating with Colleges and Schools to collect missing faculty credentials.
Building Blocks for Continuous SACSCOC Compliance
REVIEW PROCESS

• Internal Team

• External Experts
Contact Information

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Dr. Tena Crews  
Associate Provost for Academic Programs and Director of Distributed Learning  
Tcrews@hrsm.sc.edu  
Ext. 7-3245
BREAK
**BREAK OUT SESSIONS**

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
</table>
| 1. | **University Advising – Room 131**  
CLAIRE ROBINSON, ASSISTANT DEAN FOR UNDERGRADUATE ADVISEMENT AND DIRECTOR OF UNIVERSITY ADVISING CENTER |
| 2. | **CIO Update – Room 136**  
DOUG FOSTER, CHIEF INFORMATION OFFICER |
| 3. | **Debriefing of PeopleSoft Implementation – Room 289**  
CAROLINE AGARDY, VICE PRESIDENT FOR HUMAN RESOURCES |
| 4. | **Budget Model Update – Room 395**  
JOE SOBIERALSKI, ASSISTANT VICE PRESIDENT FOR ADMINISTRATIVE OPERATIONS |
Undergraduate Advising & Faculty/Student Mentorship

Claire Robinson, Ph.D.
Assistant Dean of Undergraduate Advisement
Director of the University Advising Center
University of South Carolina
2014-2015 Advising Coordinating Taskforce (ACT)

- Faculty, Staff, Students
- Surveys & Audit
- National best practices
- Six Recommendations
  1. Establish Advising Center & First-Year Advisors
  2. Support Colleges & Schools
  3. Training & Certification
  4. Technology & Online Resources
  5. Faculty-led Student Programs
  6. Student Responsibility
Six A.C.T. Recommendations

1. Establish a USC Advising Center and First-Year Advisors to facilitate consistent student advising of all undergraduates, with attention to first-year and other students in transition.

2. Establish expectations and processes for the advising of freshmen, transfer, and continuing students within their respective colleges and schools.

3. Provide training and certification programs for First-Year Advisors and others who advise that incorporate USC academic requirements and national best practices.

4. Provide technology and online resources that enable efficient and effective advising.

5. Offer faculty-led student programs to assist first-year and continuing students to explore and connect with their fields of study and career opportunities.

6. Develop a culture of student responsibility for academic and career planning.
“The quality of academic advising is the single most powerful predictor of satisfaction with the campus environment for students at four-year schools”  
(Kuh, et. al., 2006, p.60)
Expanding Role of Academic Advising

Traditional Advising

- Course Planning
- Major Guidance

Growing Portfolio of Advisors Responsibilities but Critical to Student Success
Expanding Role of Academic Advising

Traditional Advising

- Course Planning
- Major Guidance

Extended Responsibilities

- Early Alert Response
- Co-curricular Engagement
- First-Year Orientation
- Transfer Onboarding

Growing Portfolio of Advisors Responsibilities but Critical to Student Success
Progressive Offices Extending Their Efforts to Become More Strategic

Expanding Role of Academic Advising

Traditional Advising
- Course Planning
- Major Guidance

Extended Responsibilities
- Early Alert Response
- Co-curricular Engagement
- First-Year Orientation
- Transfer Onboarding

Emerging Trends
- Study/Skills Coaching
- Holistic Advising
- Financial Aid Advising
- Career Counseling
- Personal Coaching
- Predictive analytics

Past
Growing Portfolio of Advisors Responsibilities but Critical to Student Success
Future
Academic Advising Structure at the University of South Carolina

• “Shared-split model.” (NACADA)
• Advising takes place in the 11 Colleges/Schools, Advising Center, and specialized offices (OSP, Honors) etc.
• Advisors include both faculty and professional staff members
  • 150 professional staff advisors
  • 518 faculty advisors (in CEC and CAS)
  • 62 resource advisors
  • UAC employs 35 FYA/UAAs – assigned to colleges, based on 300:1 (Decentralized)
  • 10 Exploratory Advisors & Academic Coaches

• Nationally, approximately 27% of all institutions have a shared-split model (NACADA)
Goal: a standard student experience

The University Advising Center works towards “standardization” of a decentralized advising model based on national best practice.
First-Year/Undergraduate Advisor Position Description

**Academic Advising (80%)**
- Average 30 hours per week
- Assigned approximately 300 advisees

**Student Monitoring, Intervention, & Technology (10%)**
- Maintain systematic and frequent contact with advisees. Monitor, identify, and support students with academic difficulties. Utilize technologies including EAB Student Success Collaborative, Self-Service Carolina, scheduling software, Degree Works, etc.

**Training & Development (5%)**
- UAC training and certification completion.

**Assigned College Operations (5%)**
Undergraduate Students & Assigned Academic Advisors

- In Fall 2015 USC-Columbia had 30% of all undergraduate students assigned an advisor.
- In Fall 2016 USC-Columbia had 67% of all undergraduate students assigned an advisor.
- In Fall 2017 USC-Columbia has 80% of all undergraduate students assigned an advisor.
- In Fall 2018, USC-Columbia has 95% of all undergraduate students assigned an advisor.
  - (n=25,397/26,733)
1. Standardized Best Practice
   (Training/on-boarding, technology, ratios, outreach/intervention, etc.)

2. Management Plan
   (Memorandum of Collaboration, position descriptions, Performance Reviews, tiered career ladders, funding, and assessment)

3. College/Curricular Specifics
   (day-to-day operations, application of university policies/procedures, determining degree applicability, nuances of curriculum, etc.)
Approximately **how much time** do you spend with your Academic Advisor in your college/school?

- **15 minutes or less**: 36% (2014), 41% (2017), 42% (2019)
- **16-30 minutes**: 33% (2014), 44% (2017), 42% (2019)
- **31-45 minutes**: 7% (2014), 13% (2017), 13% (2019)
- **46-60 minutes**: 1.30% (2014), 4% (2017), 3% (2019)
- **1 hour or more**: 2.50% (2014), 1% (2017), 1% (2019)
Expectations and Carolina Core

- My advisor and I discuss the purpose and expectations of academic advising.
  - 2014: 42%
  - 2017: 74%
  - 2019: 71%

- My academic advisor explains the purpose and requirements of the Carolina Core.
  - 2014: 55%
  - 2017: 75%
  - 2019: 82%
Student Satisfaction with Advising
Percentage of Students Who Said They Were “Extremely Satisfied” With Advising at USC

- **Four-Year Graduation Rate**
  - 2014: 54.4%
  - 2017: 58.1%
  - Increase: +3.7%

- **Six-Year Graduation Rate**
  - 2014: 73.2%
  - 2017*: 74.2%
  - Increase: +1%

*2017 graduation data is preliminary pending submission to IPEDS
Source: OIHEA, IPEDS Graduation Rate Survey
CHARTING A PATH
Visualizing students' educational journeys has informed recruitment and retention efforts at the University of California Davis (UCD). The tool was developed by the IAMSTEM HUB in Undergraduate Education.
### Major Map: Biological Sciences – Bachelor of Science (B.S.)

**Department of Biological Sciences**  
**Catalog Year:** 2017-2018

This course plan is a recommended sequence for this major. Courses designated as critical (!) may have a deadline for completion and/or affect time to graduation. Please see the Program Notes section for details regarding “critical courses” for this particular Program of Study.

<table>
<thead>
<tr>
<th>Semester One (17-18 Credit Hours)</th>
<th>Semester Two (17-18 Credit Hours)</th>
<th>Semester Three (16-17 Credit Hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>! ENGL 101 Critical Reading and Composition</td>
<td>! ENGL 102 Rhetoric and Composition</td>
<td>STAT 205 Elem. Stat. for the Biol. &amp; Life Sciences</td>
</tr>
</tbody>
</table>
| MATH 122 Calculus for Bus. Admin. & Soc. Sciences  
 or MATH 141 Calculus 1 3 | MATH 142 Calculus II  
 or MATH 170 Finite Mathematics  
 or MATH 172 Math. Modeling for the Life Sciences 3 | BIOL 301 (2nd optional Lab) – Ecology & Evolution  
 or BIOL 302 (2nd optional Lab) – Cell & Molecular Bio.  
 or BIOL 303 Fundamental Genetics |
| ! BIOL 101 & Lab – Biological Principles 103 | ! BIOL 102 & Lab – Biological Principles II  
 or CHEM 112 & Lab – General Chemistry II | CHEM 333 & 331 Lab – Organic Chemistry I  
 or CHEM 333 & 331 Lab – Organic Chemistry I 5 |
| ! Foreign language* or other Carolina Core Requirement? 2 | ! Foreign language* or other Carolina Core Requirement? 2 | ! Foreign language* or other Carolina Core Requirement? 2 |

<table>
<thead>
<tr>
<th>Critical</th>
<th>Course Subject and Title</th>
<th>Credit Hours</th>
<th>Min. Grade</th>
<th>Major GPA</th>
<th>Code</th>
<th>Prerequisites</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>!</td>
<td>ENGL 101</td>
<td>3</td>
<td>C</td>
<td>CC-CMW</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| !        | MATH 122                | 3-4          | C           | CC-ARP    | MATH 111/1111/1115 (MATH 122);  
 MATH 115 (MATH 141); or Math placement test |
| !        | BIOL 101 & Lab – Biological Principles 103 | 4 | C | CC-SCI | MATH 111, 115 or Math placement test |
| !        | CHEM 111 & Lab – General Chemistry I | 4 | C | PR | MATH 111, 115 or Math placement test |
| !        | Foreign language* or other Carolina Core Requirement? 2 | 3 | C | CC-GFL |       |               |       |
| !        | ENGL 102                | 3            | C           | CC-CMW    | C or better in ENGL 101 |
| !        | MATH 142                | 3-4          | C           | CC-ARP    | MATH 141 (MATH 142); MATH 111/1111/1115 or Math placement test (MATH 170);  
 MATH 122 or 141 (MATH 172) |
| !        | BIOL 102 & Lab – Biological Principles II | 4 | C | CC-SCI | BIOL 101 & Lab |
| !        | CHEM 112 & Lab – General Chemistry II | 4 | C | PR | CHEM 111 or 141 and MATH 111, 115 or higher math; Prereq or coreq: MATH 122, 141 or higher & CHEM 112L |
| !        | Foreign language* or other Carolina Core Requirement? 2 | 3 | C | CC-GFL |       |               |       |

**Notes:**
- Critical courses have a deadline for completion and/or affect time to graduation.
- Prerequisites are required for specific courses.
- Notes section provides additional details.

---

**Major Maps, Linked from the Bulletin**

Faculty/Student Mentorship Programs

https://sc.edu/about/offices_and_divisions/advising/advisor_toolbox/faculty_mentorship/index.php
Faculty/Student Mentorship

Faculty play a critical role in Gamecock undergraduate student success. Students who have frequent contact with faculty members are more satisfied with their educational experiences, are less likely to drop out, and perceive themselves as having learned more than students who have less faculty contact.

Research and Benchmarking

Learn what current research exists on the impact of faculty engagement with undergraduate students and how other institutions are creating mentorship programs for their students.

Faculty: Become a Mentor

Learn more about current faculty/student mentorship opportunities on the
Purpose: To provide structured mentorship & development opportunities for all HRSM students that position them for professional success in the workplace.
“Meet My Major” Event Logistics

**The University Advising Center will:**
- Work with College to solidify date/time/location
- Marketing materials
  - Electronic and postcard invitations, poster advertisements, email graphics, event signage, etc.
- Event registration
- Catering
- Work with First-Year/Undergraduate Advisor to coordinate logistics

**Faculty Members will:**
- Prepare a 10-15-minute presentation:
  - Career Path to UofSC-Columbia
  - Research (past/current/future)
  - Student guidance
- Engage in round-table discussions with students (sample questions provided)
- If interested, serve as a faculty mentor to undergraduate students throughout the academic year.
Dear Chemistry and Biochemistry Majors,

Please join us and learn more about what it means to be a Chemistry or Biochemistry major. Meet the faculty in these programs and learn more about their research as well as engage in academic discussions.

Wednesday, February 27, 2019
1:00 p.m. – 3:00 p.m.
John M. Palms Center for Graduate Science Research, Conference Room 101
Light snacks will be provided
RSVP by 2/25/2019 – [https://universityadvisingcenter.wufoo.com/forms/12vtrqzl0gmll6z/](https://universityadvisingcenter.wufoo.com/forms/12vtrqzl0gmll6z/)
Meet My Major
Faculty/Student Mentorship
Fall 2019

Currently scheduled:
• College of Social Work (Wednesday, September 18)
• Department of Psychology (Wednesday, September 25)
• Department of English, Language and Literature (Wednesday, October 2)
• Department of Chemistry and Biochemistry (Tuesday, October 15)
• Department of Sociology (mid-October)
• Women’s and Gender Studies Program (pending)
Faculty: Become a Mentor

Undergraduate students already have several opportunities to interact with faculty members outside the traditional classroom setting. Find a current opportunity to interact with students in your college/school.

Ten Ways to Become a Faculty/Student Mentor

Per the Faculty Manual at USC-Columbia, faculty mentorship is a teaching function used to enhance student performance for the purposes of tenure and promotion (see Faculty Manual for more information).

For Faculty Interested in On-Going Opportunities:

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Meet My Major Event*</td>
<td>Informational session led by faculty to inform undergraduate students of opportunities to engage with their major once per semester.</td>
</tr>
</tbody>
</table>

Submit your interest in hosting a Meet My Major Event for your department and complete the information below, and we will be in touch soon to talk about your event.

Name*
First Name
Last Name
Department*

I am a:
1. Faculty Mentor
2. Staff Mentor
3. Department Administrator

List possible dates, times, and locations for your event:

Approximately how many faculty members will participate in your event?:

sc.edu/advising

Claire Robinson, PhD
777-4885
Claire.Robinson@sc.edu
CIO UPDATES

August 2019

UNIVERSITY OF
South Carolina
Division of Information Technology
RESEARCH COMPUTING

New HPC resources arrive in September
• Adding 120 compute nodes
• Adding 44 GPU nodes
• Hyperion 14,632 Cores Total
• Performance ~910 TFLOPS
• More than 30x performance in 2 years
• Hyperion Cluster connected 100Gb Network
RESEARCH COMPUTING

• Dr. Sean Norman, Associate Professor
• Paul Sagona, Executive Director Research Computing
• Large scale metagenomics analysis
• Invited to speak at International Google Next Conference
• Proof of concept for large scale research cloud computing
• Ran job on 124,000 cores – 20x our cluster
• Job completed in 16.6 hours – would take 3.5 months
TEACHING & LEARNING

• Evening Classroom AV Support
• Upgraded to Banner 9 Student Information System
  • Enhanced interface, process management, broad browser support
• Blackboard Ally – Accessibility Toolset
• Working on a proposal for unified classroom technology
• Working on a proposal for zone-based classroom support
• Working on Wi-Fi upgrade proposal
GOVERNANCE & ADMINISTRATION

• Migrated email to the cloud
• Established Research Computing Advisory Committee
• Established Data Governance people, process & technology
• Established unITe Committee & chartered first project
• Upgraded our Core Network to 100Gb
• Completed PeopleSoft HR/Payroll Phase I
• Completed Identity & Access Management Implementation
QUESTIONS?
HR/PAYROLL PROJECT (HCM)
PROVOST RETREAT BRIEFING

AUGUST 23, 2019
HCM ELEMENTS OF SUCCESS

• Outreach efforts lead by the Organizational Change Management across all USC Campuses
• The structured methodology and technical expertise of our Integration Partner, IBM
• The commitment of the Executive Steering Committee to governing principles
• Engagement of the USC community at all stages of the project to help shape the new system
• In-person training and training tools
HCM EFFICIENCIES

• Replaced more than 78% of the paper forms in HR and Payroll
• Electronic forms are easy to use and auto populates many fields
• Ability to track approval workflow on most forms
• Significant electronic data validation
HCM SUPPORT

- HCM Support Team - includes people who served on the project team, so they bring know-how to every service situation. Consultants were let go in July so there is a learning curve on the technical side.

- HCM Training Team - provide refresher courses, weekly communications containing system update information to end users, and Ready Room opportunities
ACTIONS INITIATED – 4/1 THRU 8/1

- Account Code Changes = 1336
- Retro Account Changes = 865
- Additional Hires = 710
- Affiliate Actions = 993
- Hires = 1677
- Job Changes = 2813
- Status Changes = 849
- Student Hires = 6751
- Supplemental Pay = 1134

= 17,128
AREAS FOR IMPROVEMENT

• Student Employment
• Summer Instruction and Research
• System Access
• Overpayments
ASSISTANCE NEEDED

- Paperwork must be submitted according to the published timelines for each paycycle. Delayed and late paperwork to HR and Payroll affects timeliness of employee/student pay.
- Hourly employees must ensure that hours are in iTAMS timely and accurately. Managers and supervisors must approve timely.
- Retro actions are problematic and require extra effort to process.
- Do not let someone begin work before they are officially hired. Federal law mandates certain authorization such as the I-9 and e-verify process. Your department is subject to fines.
HCM GOING FORWARD

• Continued stabilization
• Phase 2 coming later, Time and Labor will replace our iTAMS system
NEW BUDGET MODEL UPDATES

• FY20 budget, while adopted in the legacy format, was also drafted in new budget format.
  • This information was shared with college business managers and unit directors in late June/early July.

• Two changes were made to certain budget model allocations.
  • These changes were communicated to deans, directors and members of the budget model steering committee immediately following adoption of the FY20 budget on June 21, 2019 via a memo from Kelly Epting, Associate VP for Finance.

• The Budget Office will begin to periodically report draft model results and share with Deans and Business Managers.

• Governance structure of new budget model will begin to be implemented.
<table>
<thead>
<tr>
<th>SOURCES</th>
<th>LEGACY BUDGET</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Base Budget</td>
</tr>
<tr>
<td></td>
<td>Summer Tuition</td>
</tr>
<tr>
<td></td>
<td>Program &amp; Other Fees</td>
</tr>
<tr>
<td></td>
<td>IDC - 37.5% Split</td>
</tr>
<tr>
<td></td>
<td>Grant, Contract &amp; Gift Revenue</td>
</tr>
<tr>
<td></td>
<td>Sales, Services &amp; Other Revenue</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>USES</th>
<th>SOURCES</th>
<th>NEW BUDGET (DRAFT)</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Less</td>
<td>- Less</td>
<td>SUMMER TUITION</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PROGRAM &amp; OTHER FEES</td>
</tr>
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<td></td>
<td>CONTRIBUTIONS &amp; GIFT INCOME</td>
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<tr>
<td></td>
<td></td>
<td>SALES, SERVICES &amp; OTHER REVENUES</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>USES/MODEL</th>
<th>NEW BUDGET (DRAFT)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>NEW- APPROPRIATIONS</td>
</tr>
<tr>
<td></td>
<td>NEW - IDC – ADDITIONAL 62.5%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>USES/MODEL</th>
<th>NEW BUDGET (DRAFT)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>PERSONNEL &amp; NON PERSONNEL EXPENSES</td>
</tr>
<tr>
<td></td>
<td>GRANT EXPENSES</td>
</tr>
<tr>
<td></td>
<td>NEW - SUPPORT ALLOC./INDIRECT COST</td>
</tr>
<tr>
<td></td>
<td>NEW - PARTICIPATION FEE/TAX</td>
</tr>
<tr>
<td></td>
<td>NEW - SUBVENTION</td>
</tr>
<tr>
<td></td>
<td>NEW - STRATEGIC INITIATIVE FUNDING</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>RESERVES</th>
<th>LEGACY BUDGET</th>
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<tbody>
<tr>
<td></td>
<td>CHANGE IN BALANCE/MARGIN</td>
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<td>CHANGE IN BALANCE/MARGIN</td>
</tr>
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</table>
CHANGES MADE TO BUDGET MODEL METHODOLOGY

• **Change #1: Undergraduate student tuition split**

  **Current Assumption:** 70% to college of instruction and 30% to college of record/major

  **Previous Assumption:** 80% to college of instruction and 20% to college of record/major

  • Changes based on feedback from University auditor and BOT members.
  • Informed by comments from deans wanting more incentive to recruit majors to their colleges.
  • The 70% / 30% split concept was part of previous discussions of the budget model steering committee.
  • Based upon feedback from Huron (consultant used during budget model concept) tuition splits such in this range are often adopted by institutions of our size and scope.
• Change #2: Participation fee rate

**Current Assumption:** 16.8% of units’ unrestricted portion of tuition, state appropriations, indirect costs recovery and sales, services and other revenue.

**Previous Assumption:** 8.5% of units’ unrestricted portion of tuition, state appropriations, indirect costs recovery and sales, services and other revenue.

- Rate is mathematically calculated based on need to subvene (subsidize) certain colleges whose pedagogy, accreditation needs, etc. do not support covering all direct costs.
- Changes based upon desire for “Hold Harmless” concept (i.e. for the current year draft model no units’ budget will increase or decrease as a result of the budget model methodology.)
- Change is also influenced by undergraduate tuition split modification and FY19/20 budget decisions.
- Based upon feedback from Huron participation fee rates of this level are typical for institutions of our size and scope.
CHANGES MADE TO BUDGET MODEL METHODOLOGY

• Change #2: Participation fee rate calculation:

Funding Requirement to “Hold Harmless”: $95,439,278

Tuition Total – Academic Units (Not Program Fees): $418,702,468
General Appropriations Total – Academic Units: 127,553,250
Indirect Cost Recovery – Academic Units: 19,276,938
Sales, Service and Other – Academic Units: 4,083,350
Total Revenue Subject to Participation Fee $569,616,006

Hold Harmless Requirement $95,439,278

Revenue Subject to Participation Fee $569,616,006

= 16.8%
NEW BUDGET MODEL NEXT STEPS
Proposed Governance Structure – Subject to Change

Operational Support Teams
- Model Development Team
  - Develop budget calendar and guidelines.
- Model Analysis/Reporting Team
  - Develop model reports for users at various levels and analyze model results.
- Policy Review/Development Team*
  - Identify policies impacted by new budget model and recommend modifications and/or development of new policies.
- Training Team
  - Respond to budget model training requests to enhance budget model understanding across various groups.

Advisory Committees
- Budget Model Governance Advisory Committee*
  - Charged with advising decision makers on policy/practice matters related to format, construction and general philosophy of the budget model.
- Support Unit Allocation Committee
  - Group charged with gathering information to provide recommendation to decision makers regarding support unit allocations.
- Courses & Curricula* Committee (Existing)
  - In addition to current roles, expands charge to consider proposals for new courses to avoid unnecessary course duplication or “gaming.”
- Space Needs and Planning Committee (Existing)
  - In addition to current roles, expands role to ensure that timely and accurate space utilization data is available for users of the budget model.

Executive Groups
- BUG (Budget Update Group)
  - Group responsible for financial oversight and coordination and for deploying the strategic plan on behalf of the President and Board of Trustees.
- President
  - Ultimate decision maker related to institutional proposals to the Board of Trustees.
- Board of Trustees
  - Final decisions related to the budget.

* Faculty/Faculty Senate role envisioned

Groups to meet as needed, at least twice per fiscal year.
Support Unit Allocation Committee meetings planned to begin in October and will meet as required throughout budget process. Other committees to meet as needed.
BUG meets monthly. President and Board Briefings take place regularly throughout the year.

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# NEW BUDGET MODEL NEXT STEPS

## Budget Development Activity (Planned – Subject to Change):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Month / Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Efficiency Initiative Discussions with the President</td>
<td>September</td>
</tr>
<tr>
<td>Support Unit Allocation Committee review budgets; submits recommendations</td>
<td>October - November</td>
</tr>
<tr>
<td>Budget Update Group (BUG) reviews/approves support unit budgets</td>
<td>December</td>
</tr>
<tr>
<td>Central Budget Office forecasts general revenues (e.g. tuition, appropriations) and expenses (e.g. benefits) for budget development guidelines</td>
<td>January</td>
</tr>
<tr>
<td>Academic units develop budgets based on latest analysis and central guidance</td>
<td>January</td>
</tr>
<tr>
<td>Conduct University budget hearings (i.e. blueprint meetings)</td>
<td>March</td>
</tr>
<tr>
<td>Academic Subvention and strategic initiative funding recommendations made and communicated</td>
<td>April</td>
</tr>
<tr>
<td>University budget updated and preliminary drafted based on current tuition/appropriation projections and trends</td>
<td>April – May</td>
</tr>
<tr>
<td>Budget reviewed/adopted by Board of Trustees</td>
<td>May – June</td>
</tr>
</tbody>
</table>

## Budget Model Reporting Activity (Planned – Subject to Change):

<table>
<thead>
<tr>
<th>Activity</th>
<th>Month / Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>FY18 Actuals</td>
<td>Mid – Late August</td>
</tr>
<tr>
<td>FY19 Actuals</td>
<td>Late September</td>
</tr>
<tr>
<td>FY20 Actuals (As of 10/31)</td>
<td>Late November</td>
</tr>
<tr>
<td>FY20 Actuals (As of 2/29)</td>
<td>Late March</td>
</tr>
</tbody>
</table>
## Cost Pool Details

<table>
<thead>
<tr>
<th>Cost Pool</th>
<th>Support Units Included</th>
<th>Model Metric</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central Services &amp; Administration</td>
<td>Admin &amp; Finance, Business Affairs, HR, Development, Communications, etc.</td>
<td>Total Employee FTE</td>
</tr>
<tr>
<td>Facilities</td>
<td>Facility Services, Utilities, Facilities Projects</td>
<td>Net Assignable Square Footage</td>
</tr>
<tr>
<td>Enrollment &amp; Scholarships</td>
<td>Enrollment Management and Scholarships</td>
<td>Undergraduate Student FTE</td>
</tr>
<tr>
<td>Information Technology</td>
<td>University Technology Services (DoIT), OneCarolina</td>
<td>Total Headcount</td>
</tr>
<tr>
<td>Libraries</td>
<td>University Libraries</td>
<td>Student FTE + Faculty FTE (less Law)</td>
</tr>
<tr>
<td>Academic Affairs</td>
<td>Provost, Faculty Senate, Graduate School, International Programs</td>
<td>Student FTE + Tenure-Track FTE</td>
</tr>
<tr>
<td>Research</td>
<td>Office of Research/ Research Administration</td>
<td>Contract &amp; Grant Revenue</td>
</tr>
<tr>
<td>Academic Access &amp; Degree Completion</td>
<td>On Your Time, Palmetto College Administration, Distributed Learning</td>
<td>Student FTE</td>
</tr>
<tr>
<td>Executive Affairs</td>
<td>Board of Trustees, President, Legal, Economic Engagement</td>
<td>Total Direct Expenses</td>
</tr>
<tr>
<td>Academic Support &amp; Student Services</td>
<td>University 101, Residential Learning Centers, Student Affairs – Admin, Academic Support Services</td>
<td>UG Student FTE</td>
</tr>
<tr>
<td>Honors College</td>
<td>Honors College</td>
<td>UG Student FTE</td>
</tr>
<tr>
<td>Strategic Excellence/Efficiency Pool</td>
<td>Support unit portion of 3% excellence initiative and Efficiency Initiative</td>
<td>Total Direct Expenses</td>
</tr>
</tbody>
</table>
# Decision Points for New Budget Model

<table>
<thead>
<tr>
<th>Decision</th>
<th>Model Treatment</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Model Application</strong></td>
<td>• Currently only applies to USC Columbia (not including SOMs), however, other system institutions are included to allow for reconciliation to financial statements.</td>
</tr>
</tbody>
</table>
| **Unit Categories**                           | • **Auxiliaries**: Athletics, Housing, Parking, Student Health.  
• **Academic Units**: All areas with Deans considered academic units except for Libraries, Honors College and Graduate School.  
• **Support Units**: All other Columbia campus areas not classified above (primarily admin units). |
| **Undergraduate Tuition – Resident**          | • 70% to academic unit based on share of resident credit hours instructed (i.e. College of Instruction).  
• 30% to academic unit based on share of resident credit hours enrolled (i.e. College of Record). |
| **Graduate Tuition**                          | • 100% to academic unit based on record/major                                                                                                   |
| **Undergraduate Tuition – Non-resident**      | • 70% to academic unit based on share of non-resident credit hours instructed.  
• 30% to academic unit based on share of non-resident credit hours enrolled.                                                                     |
| **General State Appropriations**              | • 70% to academic unit based on share of enrolled resident credit hours (i.e. College of Record).  
• 30% to academic unit based on share of grants and contracts revenue.                                                                             |
| **Indirect Cost Recovery (IDC)**              | • Allocate 100% to units generating IDC.                                                                                                         |
| **Support Unit Allocations/ Cost Pools**      | • Grouped all support units into pools based on similarities of activity.  
• “Net Cost” (i.e. expenses less direct revenues) are allocated based upon metrics/drivers agreed upon as adequate “proxies”. |
## Decision Points for New Budget Model

<table>
<thead>
<tr>
<th>Decision</th>
<th>Model Treatment</th>
</tr>
</thead>
</table>
| Central Funding Mechanism | • Used to fund strategic initiatives and subvention.  
  • Includes Legacy adjustment impacting HRSM, Law, Engineering, Education and Music.  
  • Also funded through a participation fee (tax) on tuition, state appropriations, IDC and sales, services & other.  
  • Remaining funding from legacy adjustments and participation fee after subvention can be used for strategic initiative funding |
| Carryforward               | • Units generally are permitted to maintain carryforward built by retained surpluses and to be used to mitigate unforeseen losses or one-time strategic initiatives.  
  • In the event that surpluses are larger than expected or agreeable, it is assumed that conversations would be initiated with those impacted to discuss adjustments, but with intent of not limiting incentives. |

*Information used to allocate revenue/costs is received from the Office of Institutional Research, Assessment and Analytics (OIRAA) or from Facilities. The information used for budget preparation is the most recently completed fiscal year.*
BUDGET MODEL COMPARISON FOR TUITION GENERATING UNITS (COLLEGES & SCHOOLS)

**LEGACY BUDGET**

**SOURCES**
- Base Budget
- Summer Tuition
- Program & Other Fees
- IDC - 37.5% Split
- Grant, Contract & Gift Revenue
- Sales, Services & Other Revenue

**USES**
- Personnel & Non Personnel Expenses
- Grant Expenses

**NEW BUDGET (DRAFT)**

**SOURCES**
- Summer Tuition
- Program & Other Fees
- IDC – 37.5% Split
- Grant, Contract & Gift Revenue
- Sales, Services & Other Revenues

**USES**
- Personnel & Non Personnel Expenses
- Grant Expenses

**MODEL ALLOCATIONS**
- NEW - Support Alloc./Indirect Cost (-)
- NEW - Participation Fee/Tax (-)
- NEW - Subvention (+)
- NEW - Strategic Initiative Funding (+)

**RESERVES**

- Change in Balance/Margin

**LEGACY BUDGET**

**Eliminate**
- NEW - Fall & Spring Tuition (Undergrad & Graduate)
- NEW - Appropriations
- NEW - IDC – Additional 62.5%

**Maintain**
- Personnel & Non Personnel Expenses
- Grant Expenses

**ADD/New**
- NEW - Participation Fee/Tax (-)
- NEW - Subvention (+)
- NEW - Strategic Initiative Funding (+)

**RESERVES**

- Change in Balance/Margin

**USES**

- Less

**SOURCES**

- Less

**RESERVES**

- Equals

**USES**

- Equals

**SOURCES**

- Equals
## Unit Presentation - *Illustrative Example*

### Legacy Budget Model

<table>
<thead>
<tr>
<th>Category</th>
<th>Unrestricted</th>
<th>Restricted</th>
<th>Model</th>
<th>TOTAL ($ Millions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Base Budget</td>
<td>25.00</td>
<td>--</td>
<td>(25.00)</td>
<td>--</td>
</tr>
<tr>
<td>Tuition &amp; Fees</td>
<td>10.00</td>
<td>--</td>
<td>28.50</td>
<td>38.50</td>
</tr>
<tr>
<td>State Appropriations</td>
<td>--</td>
<td>--</td>
<td>20.00</td>
<td>20.00</td>
</tr>
<tr>
<td>Grants, Contracts &amp; Gifts (Includes IDC)</td>
<td>3.50</td>
<td>30.25</td>
<td>7.50</td>
<td>41.25</td>
</tr>
<tr>
<td>Sales, Services &amp; Other</td>
<td>5.00</td>
<td>--</td>
<td>--</td>
<td>5.00</td>
</tr>
<tr>
<td><strong>Total Revenue</strong></td>
<td>43.50</td>
<td>30.25</td>
<td>31.00</td>
<td>104.75</td>
</tr>
<tr>
<td>Personnel &amp; Non Personnel Costs</td>
<td>(40.00)</td>
<td>(30.25)</td>
<td>--</td>
<td>(70.25)</td>
</tr>
<tr>
<td><strong>Total Direct Expenses</strong></td>
<td>(40.00)</td>
<td>(30.25)</td>
<td>--</td>
<td>(70.25)</td>
</tr>
<tr>
<td>Transfers &amp; Contras</td>
<td>2.00</td>
<td>--</td>
<td>--</td>
<td>2.00</td>
</tr>
<tr>
<td><strong>Change in Balance – Pre-Allocations</strong></td>
<td>5.50</td>
<td>--</td>
<td>31.00</td>
<td>36.50</td>
</tr>
<tr>
<td>Support Unit Allocations (Indirect Costs)</td>
<td>--</td>
<td>--</td>
<td>(32.50)</td>
<td>(32.50)</td>
</tr>
<tr>
<td>Participation/Legacy Fee (Tax) Payment</td>
<td>--</td>
<td>--</td>
<td>(11.68)</td>
<td>(11.68)</td>
</tr>
<tr>
<td>Strategic Initiative Funding</td>
<td>--</td>
<td>--</td>
<td>2.00</td>
<td>2.00</td>
</tr>
<tr>
<td>Subvention (Subsidy)</td>
<td>--</td>
<td>--</td>
<td>11.18</td>
<td>11.18</td>
</tr>
<tr>
<td><strong>Model Allocations</strong></td>
<td>--</td>
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<td>(31.00)</td>
<td>(31.00)</td>
</tr>
<tr>
<td><strong>Change in Balance – Post-Allocations</strong></td>
<td>5.50</td>
<td>--</td>
<td>--</td>
<td>5.50</td>
</tr>
</tbody>
</table>
Adjournment