



BOARD OF TRUSTEES

Board of Trustees Retreat Agenda

November 19, 2024
1:00 – 4:30 P

Florida Polytechnic University
Barnett Applied Research Center (BARC)
and Virtual via Microsoft Teams

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BOARD OF TRUSTEES MEMBERS

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MEETING AGENDA

- | | | |
|------|---|--|
| I. | Call to Order | Beth Kigel, Chair |
| II. | Roll Call | Kristen Wharton
Corporate Secretary |
| III. | Public Comment | Beth Kigel |
| IV. | 2025-2030 Strategic Plan: Review and Discussion | Dr. Devin Stephenson,
President |
| V. | Florida Poly and BOG Legislative Budget Requests (LBRs) | Dr. Allen Bottorff
Vice President and CFO |
| VI. | Legislative Plan and Advocacy | Kelli Stargel
Associate Vice President
Strategic Relationships |
| VII. | Closing Remarks and
Adjournment | Beth Kigel |

Florida Polytechnic University
Board of Trustees
September 19, 2024

Subject: 2025-2030 Strategic Plan: Review and Discussion

Proposed Board Action

Information only – no action required.

Background Information

President Devin Stephenson, along with Vice Presidents Dr. Brad Thiessen, David Fugett, Bryan Brooks, Kathy Bowman, Dr. Allen Bottorff, Mike Dieckmann, and AVP Kelli Stargel, will present the final draft of the 2025-2030 Strategic Plan.

It is the intent of the President to seek feedback from and engage in meaningful discussion with Board Trustees on the following:

1. Mission and Vision Statement
2. Guiding Principles
3. Priorities, objectives, and goals

Supporting Documentation: 2025-2030 Strategic Plan Draft

Prepared by: Dr. Devin Stephenson, President



FLORIDA POLYTECHNIC
UNIVERSITY®

2025-2030

STRATEGIC PLAN

Proposal for Board Discussion and Approval

TODAY, we define the **FUTURE**.



TABLE OF CONTENTS

4 Mission and Vision

6 Our Collaborative Vision

9 Priorities

12 Priority One

15 Priority Two

17 Priority Three

18 Conclusion & Citations

MISSION STATEMENT

We serve students and industry through educational excellence and the discovery, advancement, and application of knowledge in science, technology, engineering, and mathematics.

VISION STATEMENT

Highly desirable graduates and solutions for a resilient high-tech economy.



GUIDING PRINCIPLES

Excellence and Opportunity

To pursue the highest quality of academic and institutional success while ensuring access to opportunities for all students.

Explanation: This principle is rooted in a strong commitment to continuous improvement and innovation across the University. It emphasizes upholding high educational standards, driving operational efficiency, and creating a culture where all students can excel and reach their full potential.

Student Focus

To prioritize the needs, success, and well-being of students in every aspect of the institution.

Explanation: This principle guides the University to create a supportive environment where all policies and resources are centered on student learning, growth, and experience. It reflects the University's solid commitment to making students the central focus of its mission.

Steadfast Integrity

To demonstrate an unwavering dedication to honesty, ethical behavior, and transparency in all aspects of the institution.

Explanation: This principle promotes an atmosphere of trust, accountability, and respect, ensuring that decisions, actions, and academic practices align with the highest moral standards. It encourages faculty, staff, and students to uphold ethical values, cultivating a positive and responsible University community.

Community Collaboration

To work together within and beyond the institution to create mutual support, leverage strengths, and achieve collective success.

Explanation: This principle focuses on building partnerships, fostering engagement, and aligning goals inside and outside the University. It drives impactful change and strengthens community bonds by uniting people, resources, and ideas.

Fearless Curiosity

To inspire a relentless drive to explore new ideas and take bold, innovative steps, particularly in areas of uncertainty.

Explanation: This principle celebrates questioning, challenging assumptions, and the bold pursuit of knowledge. It encourages the University community to push boundaries, learn from failures, and approach complex problems with curiosity, creating an environment where innovation thrives and impactful discoveries are made.

Forward Thinking

To prioritize a deep commitment to innovation, growth, and readiness for the future.

Explanation: This principle reflects the University's dedication to exploring new ideas, adopting transformative technologies, and nurturing creativity. It motivates students, faculty, and staff to think critically, adapt to emerging trends, and develop innovative solutions.

OUR COLLABORATIVE VISION

PREFACE

As we embark on a new season of accelerated advancement, this strategic plan reflects our University's dedication to shaping a future defined by excellence, uncommon innovation, and transformative impact. Florida Polytechnic University (Florida Poly) is a premier institution specializing in science, technology, engineering, and math (STEM), meaning we are uniquely positioned to lead in a world where these fields are driving the most significant global changes.

In an era of rapid technological and scientific breakthroughs, our commitment to STEM education and research equips us to address the complex challenges of tomorrow. We recognize the responsibility we hold in preparing the next generation of innovators, problem-solvers, and thought leaders—those who will define the future of industry, technology, health care, and more.

This plan outlines our vision for continued excellence in academic rigor and research, while embracing new, bold opportunities for interdisciplinary collaboration and technological advancement. It highlights strategies that will position our University at the cutting edge of discovery, from advanced scientific inquiry to groundbreaking engineering innovations.

By fostering creativity, enhancing partnerships, and engaging with industry and the global academic community, we will extend our influence far beyond our campus. Together with our faculty, students, and stakeholders, we will push the boundaries of STEM education, ensuring that Florida Poly remains a global leader and a catalyst for progress at this critical moment.

This is not just a time for growth—it is a time for transformation. Our focus on STEM will continue to elevate our standing as a trailblazer in education, research, and innovation. The future demands a university that not only keeps pace with change but sets the pace—and this plan is our roadmap to doing just that.

Let us move forward with bold vision, confidence, and an unwavering commitment to the pursuit of excellence in STEM and beyond. Together, we will define the future.

SEASON OF ACCELERATED ADVANCEMENT

During its first decade, from 2014 to 2024, Florida Poly laid a robust foundation for the institution's future growth. Despite facing unexpected challenges and obstacles, the University has not only persevered but is now poised for significant progress. With a team of skilled and experienced higher education administrators at the helm, Florida Poly is embracing a new, success-driven culture rooted in respect, transparency, and gratitude for all stakeholders' contributions.

Our senior leadership understands the complexities of higher education and is equipped to navigate change more effectively than ever before. According to "What Higher Education Will Look Like in 10 Years," a 2024 report from The Chronicle of Higher Education, the changes in higher education over the next decade and beyond will occur at an unprecedented pace. Key factors driving these changes include declining enrollment, demographic shifts, changed attitudes toward higher education, and economic pressures.

As the landscape shifts, Florida Poly recognizes that surviving universities will be those that demonstrate agility and foresight in adapting to these emerging realities. Proactively, we will prioritize innovative strategies to enhance student engagement and support, ensuring that retention rates improve alongside enrollment efforts.

We will embrace technological changes and flexible learning models to meet the varying needs of students, preparing them for a rapidly changing job market.

Additionally, Florida Poly will cultivate stronger relationships with industry partners to align academic offerings with workforce demands, creating pathways for students that lead to meaningful careers.

By implementing these strategic initiatives and fostering a collaborative approach that values varying perspectives—both within the University and beyond—Florida Poly will create a dynamic environment essential for solidifying our future success. This strategic focus will enable us to harness our collective strengths and address challenges proactively, ensuring that we continue to thrive as we move forward.

Through these targeted efforts and a commitment to collaboration, Florida Poly is poised to secure its future success and maintain its reputation for academic excellence and career readiness. In 2024, the University was recognized as the No.1 public college in the Southeast for the fourth consecutive year and ranked among the Top 20 public engineering programs in the country without a Ph.D., according to U.S. News & World Report, highlighting our effective combination of affordability and top academic performance. Additionally, WalletHub ranked Florida Poly as No. 1 among public universities in the nation for best career outcomes.

Florida Poly's impact goes far beyond academics, contributing more than \$300 million annually to the regional economy (2019). We provide the best return on investment among state universities, with our graduates achieving the highest earning power one year after graduation and carrying the least amount of debt, according to the state's MyFloridaFuture tool and an analysis of federal data conducted by The Palm Beach Post. Notably, 93% of our students come from Florida, and over 85% choose to stay in the state after graduation, contributing to the region's continued growth and prosperity.

While Florida Poly has been widely recognized for its exceptional education and significant contributions to the region, University leadership acknowledges there are areas that need improvement to further elevate student success. These include challenges with some performance-based metrics, particularly graduation and retention rates. One key factor affecting retention is our all-STEM focus, which currently lacks many alternative pathways for students who wish to change majors—an option available at other state institutions. To address this, the University is actively working on expanding academic offerings to provide a greater variety of STEM-related options and enriching support systems based on best practices that will help keep students on-track and achieve their degrees within four years.

Through these efforts, we are laying the groundwork for a future where Florida Poly is ranked as the top STEM university in the South and is widely recognized for producing well-rounded graduates in high-demand fields who are prepared to be leaders in industry. As high-tech employers seek out strong collaborative opportunities with the University, many of these businesses will move their technology centers into a vibrant research park anchored by the University, amplifying Florida Poly's growing research influence in critical fields.

IMPORTANCE OF STRATEGY IN SHAPING A BRIGHT FUTURE

In today's rapidly changing educational landscape, developing a strategy is crucial for creating a bright future for institutions like Florida Poly. A well-defined strategy acts as a roadmap, guiding our decisions and actions toward clear goals while allowing us to adapt to emerging challenges and opportunities.

By prioritizing strategic planning, we can identify our strengths and areas for growth, ensuring that we allocate resources effectively and pursue initiatives that align with our mission and that of the State University System of Florida. This approach not only fosters uncommon innovation but also enhances collaboration among faculty, staff, and stakeholders, creating a united front in our pursuit of excellence.

Ultimately, leveraging strategy is not just about achieving immediate objectives; it is about laying the groundwork for sustained success and resilience. By embracing strategic thinking, we ensure that Florida Poly can adapt, innovate, and fulfill its commitment to our students and community.

The statistical value of using strategy in leadership teams can be seen across various studies and metrics that highlight its impact on organizational performance. Here are some key findings:

- Research shows that organizations with a clearly defined strategy often outperform their peers. A study (2012) by the Harvard Business Review found that companies with a strong strategic focus tend to have higher revenue growth and profitability.
- According to Gallup (2021), organizations that effectively communicate their strategy see a 20% increase in employee engagement. Engaged employees are more productive and contribute positively to the organizational culture.
- A study (2018) by PwC indicated that organizations with strategic planning processes are 2.5 times more likely to be considered innovative. This correlation suggests that strategic thinking encourages a culture of innovation.
- A report (2024) from McKinsey & Company found that organizations that leverage strategic frameworks in decision-making processes can reduce decision-making time by up to 25%, allowing for quicker responses to market changes.

In summary, employing a strategic approach correlates with improved performance, higher employee engagement, increased innovation, faster decision-making, long-term sustainability, and better customer satisfaction—all of which contribute significantly to our organization's success.

UNIVERSITY STRATEGIC PLANNING PHILOSOPHY

The planning process for the 2025-2030 Florida Poly Strategic Plan is characterized by its broad-based, interrelated, and participatory nature. This approach involves a varied group of stakeholders, including student leadership, faculty, staff, administration, members of the Board of Trustees, Foundation representatives, and numerous external influencers from Central Florida.

The goal was to ensure that the plan's development was collaborative and shaped through listening, observing, and actively gathering input from all corners of the University community. This method fosters thoughtful integration and promotes high levels of engagement from everyone involved.

Importantly, this plan does not belong solely to the president or the administration; it is a collaborative effort that synthesizes a wealth of ideas and perspectives. It represents a shared vision and purpose, reflecting the collective aspirations of the entire University community.

METHODOLOGY

To create an effective strategic plan, the president initiated a process designed to ensure objective input from a wide range of stakeholders. A consultant was brought on board to assist in crafting the plan and facilitate the first Strategic Planning Summit, which took place on Sept. 7, 2024, at Catapult in Downtown Lakeland. The summit brought together 35 internal and external stakeholders, including University personnel, influencers and community leaders. The event aimed to foster collaborative, thoughtful discussions focused on developing key priorities that would serve as the foundation of our 2025-2030 Strategic Plan.

As a result of that day's work, our consultant, Dr. Craig Collins of Sterling Consulting Services, identified three priorities he recommended as a roadmap for developing goals, objectives, and initiatives to strategically align with Florida Poly's mission and vision. This approach ensured our work remained mission-driven, with a clear focus on our purpose and long-term objectives.

The summit began with a challenge by Board Chair Beth Kigel, followed by remarks from President Devin Stephenson. Dr. Collins was then introduced and outlined the day's agenda, which included our Guiding Principles for Strategic Planning: Intentional Service; Think, Learn, and Work Together; Recognize All Voices; Be Audacious; and Confidence in the Vision, Articulated by Strategy and Executive Engagement.

We then shifted our focus to gathering group input on the underlying assumptions – positive and negative – related to Florida Poly's current position. Following this exercise, senior leadership team members provided a snapshot of the University's status in their specific functional areas: housing, student enrollment, retention, land acquisition, degree programming, endowment, students' demographics, infrastructure, and SUS Performance-Based Funding metrics.

Dr. Collins followed up with a pivotal question, "In what areas does Florida Poly need to grow?" There was reflection time at each table, with small groups identifying specific areas for focused growth. The results were charted, revealing converging themes. Dr. Collins' team presented the identified priorities, and participants voted to reach consensus. In the end, there was overwhelming support for three primary priorities.

We then engaged in a "Start, Stop, Continue" exercise for each of the priorities. Each group worked through the process, identifying actions to stop, start, continue on each priority. Afterward, each table determined their top recommendations for each priority. A summary was developed and presented by each table.

All information obtained at the summit was recorded and presented to the president approximately a week and a half after the event. From there, the president and consultant shared the results with the vice presidents.

THREE PRIORITIES

COMPREHENSIVE INSTITUTIONAL GROWTH

Academic Excellence, Student Enrollment, Infrastructure, Research, State and Federal Appropriations, Grants, etc.

ADVANCEMENT THROUGH INTENTIONAL RESOURCE DEVELOPMENT

Develop and leverage institutional resources, including financial, technological, and human capital to enhance academic programs, foster research innovation, and support community engagement.

ACADEMIC AND INDUSTRY COLLABORATIVE PARTNERSHIPS

Acquire property and/or develop current property to create a cutting-edge research park.

THREE PRIORITIES

As we transitioned to the next phase, the president reminded the senior leadership team to align the plan's priorities with those emerging from the Board of Governors' process for development of the SUS's Strategic Plan. Those focus areas included the following: institutional excellence, student success, faculty excellence, research, industry relationships focused on student internships, operational efficiencies at each institution, and system coordination (collaboration vs. competition).

In early October, during a Strategy Circle meeting, the president charged all leadership team members to use the identified priorities and work with their teams to develop goals, strategies, and initiatives that address those priorities. They were also instructed to establish both qualitative and quantitative methods for measuring success in achieving those goals. The deadline for submission of this work was Oct. 10, 2024.

Immediately after receiving input from all our functional area teams, Dr. Collins and Stephenson convened to review feedback from the Strategy Circle members and create a well-framed preliminary plan with clearly articulated goals and objectives. This work was completed by mid-October and submitted to Dr. Tom Dvorske, vice provost, and Kevin Calkins, director of institutional research, for review through the lens of regional accreditation and the accountability standards set by the Board of Governors and the State University System. By Oct. 30, Dr. Dvorske and Director Calkins returned the document to President Stephenson with their recommendations for additions, deletions, and corrections.

The next phase involved reviewing the draft with members of the Strategy Circle and their leadership teams to clarify and adjust goals and objectives as needed. Proposed changes were submitted by early November.

Chair Kigel and President Stephenson then conducted a virtual TEAMS call with members of the Strategy Circle to present the final draft of the 2025-2030 Strategic Plan. The purpose of this meeting was to gather Chair Kigel's insights on any necessary changes the administration should make. After incorporating her revisions, the president and Chair Kigel shared the updated document with the Board of Trustees in preparation for a thorough discussion during the Board's annual retreat in November 2024.

Finally, the document was presented to the Board of Trustees for approval at its November meeting. Once approved, the president submitted the strategic plan to Chancellor Ray Rodrigues and the Board of Governors for their consideration, with approval anticipated after January 2025.

PRIORITY ONE

COMPREHENSIVE INSTITUTIONAL GROWTH

OBJECTIVE: To drive comprehensive growth at Florida Poly via multifaceted strategies that enhance academic excellence, expand research capabilities, and strengthen community and industry partnerships.

GOAL 1: *Maximize Florida Poly and industry collaboration by establishing a robust framework for corporate engagement.*

The goal includes a dynamic research park that serves as a hub for industry collaboration and innovation where students engage in transformative research projects that address real-world challenges. By forming strategic partnerships with leading companies and innovative organizations, Florida Poly will create pathways for student internships and job placements and avenues for faculty to connect with industry-proven leaders, ensuring graduates are well-prepared innovators for the workforce.

To support this initiative, the University will cultivate a robust alumni network, reconnecting with former students and encouraging their involvement in mentorship and industry insights while fostering connectivity between the University and corporate partners by augmenting industry engagement. Ultimately, this integrated approach will position Florida Poly as a leader in innovation and community engagement, benefiting students, alumni, and industry alike.

- INITIATIVE 1.1** Grow the opportunities as a research University by creating a research park.
- INITIATIVE 1.2** Identify the top ten organizations to become a “Florida Poly Research Park Mega Partner.”
- INITIATIVE 1.3** Create Specialized Alumni Networks in industry to foster networking, industry collaboration, and corporate engagement.

GOAL 2: *Strengthen the reputation and influence of Florida Poly by positioning the University as a leading economic driver in the region.*

Florida Poly will actively engage local, regional, national, and global influencers in a collaborative effort to expand state legislative resource development. By forming strategic alliances with key stakeholders, including policymakers, industry leaders, and community organizations, Florida Poly will advocate for increased funding and support for higher education initiatives. Further, by leveraging the excellent and long-established work of the FIPR institute we will expand our applied research impact and include launching an office focused on patents and technology transfer. This collective approach will not only enhance University resources but also promote research and academic programs on a broader scale. While elevating Florida Poly’s ranking, visibility, and impact, University leadership will foster a culture of excellence that attracts world-class talent and advances the University’s reputation, both domestically and internationally.

- INITIATIVE 2.1** Develop and maintain strong relationships with internal and external stakeholders to ensure the institution is effectively connecting with local, county, regional, state, and federal influencers, entities, and policymakers.

- INITIATIVE 2.2** Expand State legislative resource development efforts through robust budget requests and an aggressive plan to build out the campus infrastructure to accommodate a growing student body.
- INITIATIVE 2.3** Expand FIPR's research footprint through the state and beyond and operationalize an Office of Patents and Technology Transfer to capitalize on the value of applied research.

GOAL 3: *Cultivate a rich Florida Poly Experience for students, staff, and faculty.*

Florida Poly is dedicated to ensuring rich, fulfilling experiences for students, staff, and faculty. We will actively foster a climate of free expression and civil discourse within a safe and secure campus and collaborate closely with campus stakeholders and external law enforcement agencies to protect students, faculty, and staff. We will also increase academic offerings and student enrollment by developing innovative programs and modernizing student information systems that attract diverse learners and foster a culture of academic excellence. Florida Poly will recruit world-class faculty who will bring cutting-edge research and industry experience, enhancing the quality of education and student engagement. By accelerating comprehensive support services focused on student success, Florida Poly aims to improve retention and graduation rates. Additionally, the University will create faculty learning opportunities that prepare students for the ever-changing job market, ensuring students are equipped to step into the next generation of innovators, problem-solvers, and thought leaders—those who will define the future of industry, technology, healthcare, and more.

- INITIATIVE 3.1** Ensure a climate of free expression and foster civil discourse through OPPE programming according to the principles set forth in the State University System Free Expression Statement and the Board of Governor's Civil Discourse Final Report.
- INITIATIVE 3.2** Collaborate with campus stakeholders and external law enforcement agencies for a safe and secure campus environment for students, faculty, and staff.
- INITIATIVE 3.3** Expand academic programming to include new industry-responsive undergraduate science, technology, engineering, and mathematics (STEM) programs, three master's degree or graduate certificate programs to meet the state's workforce need, and we will set the foundation for launching a doctoral program.
- INITIATIVE 3.4** Increase and retain Florida Poly's world-class faculty to ensure quality education and deliver impactful research.
- INITIATIVE 3.5** Modernize student-related information systems to enable more effective and efficient student information management, empower academic program and curriculum management, enhance support of student success, and improve the student and faculty digital services experience.
- INITIATIVE 3.6** Increase student enrollment to 3,000.
- INITIATIVE 3.7** Open a campus store to provide a retail outlet for students and employees.
- INITIATIVE 3.8** Foster a culture of continuous professional learning by implementing regular training sessions, mentorship and leadership programs, and access to resources that encourage ongoing skill development and knowledge among all employees.

GOAL 4: *Bolster the University's financial sustainability and infrastructure.*

To support campus growth and improve financial strength, Florida Poly will embark on mission-driven construction projects that enhance facilities while advancing unrestricted auxiliary revenue streams. This approach includes the development of comprehensive 3, 5, and 10-year plans for university parking, successfully completing student housing sufficient to support Florida Poly's enrollment goals, and addressing current needs and anticipating future demands to optimize revenue potential. By strategically investing in infrastructure, Florida Poly aims to create a sustainable environment that not only fosters student success but also generates additional financial resources, bolstering the University's overall financial position.

- INITIATIVE 4.1** Develop and implement 3-, 5-, and 10-year plans for university parking to expand options, improve processes, and create a better experience for students and employees.
- INITIATIVE 4.2** Facilitate sustainable and effective campus growth through mission-driven construction projects.
- INITIATIVE 4.3** Develop a federal resource initiative involving the onboarding of an internal grant development office and government-relations firm.
- INITIATIVE 4.4** Grow unrestricted auxiliary revenue through the introduction of additional revenue streams and national brands.
- INITIATIVE 4.5** Enhance the efficiency and effectiveness of business processes and services via automation to enable resource-efficient growth.
- INITIATIVE 4.6** Enhance our organizational effectiveness and efficiency by prioritizing the strategic utilization of our human capital, unlocking the full potential of our diverse talent, and motivating them to drive innovation and productivity in alignment with our shared mission and vision.

PRIORITY TWO

ADVANCEMENT THROUGH INTENTIONAL RESOURCE DEVELOPMENT

OBJECTIVE: To advance Florida Polytechnic University's mission by strategically developing and leveraging institutional resources, including financial, technological, and human capital, to enhance academic programs, foster research innovation, and support community engagement.

GOAL 1: *Enlarge financial assets and streamline operational efficiencies.*

Florida Polytechnic University is dedicated to growing its assets to strengthen institutional support and expand scholarship opportunities for students, ensuring greater access to a high-quality education. By developing new and maximizing existing resources, the university will elevate research output, positioning itself as a leader in technology and innovation. To further enhance operational performance, Florida Poly is optimizing efficiency through the implementation of the Workday ERP platform, streamlining processes across departments for improved collaboration and decision-making. Increasing unrestricted dollars through the Florida Poly Foundation will provide the flexibility needed to meet emerging needs and opportunities, while a new university-wide Contract Management System will standardize workflows, reduce administrative overhead, and ensure compliance. These interconnected efforts will drive Florida Poly's mission to foster educational excellence while ensuring a thriving, innovative, and financially-sustainable community.

- INITIATIVE 1.1** Aggressively grow the assets of the University's Foundation to operationally support the institution.
- INITIATIVE 1.2** Develop new and leverage existing resources to enhance research output.
- INITIATIVE 1.3** Implement tactical changes to the Enterprise Resource Planning (ERP) platform to augment financial efficiency and time-on-task entries.
- INITIATIVE 1.4** Increase unrestricted Foundation dollars to better serve students and reduce the percentage of tuition and fee waivers.
- INITIATIVE 1.5** Implement a university-wide contract management system (CMS) for optimal efficiency and centralization in essential areas.
- INITIATIVE 1.6** Augment Information Technology (IT) financing streams with IT-related grants, industry sponsorships, and partner investments.

GOAL 2: *Improve teaching, elevate student learning, and boost research productivity while strategically leveraging resources to strengthen and promote the University's brand as a leader in technology and innovation.*

Florida Polytechnic University is committed to establishing a Faculty Center for Teaching and Learning to support faculty development, aiming to improve teaching quality, enhance student learning, and boost research productivity. Alongside this initiative, the university is focused on improving faculty and staff retention, setting a goal of reducing turnover to 10% or less to maintain a strong and stable academic community.

Additionally, institutional resources will be strategically utilized to increase brand awareness, promoting Florida Poly as a leading institution in science, technology, engineering, and mathematics (STEM) education and innovation and attracting world-class talent.

INITIATIVE 2.1 Establish a Faculty Center for Teaching and Learning to support faculty development, improve teaching, promote student learning, and facilitate research productivity.

INITIATIVE 2.2 Improve faculty and staff retention to achieve a goal of 10% or less annual turnover.

INITIATIVE 2.3 Devise and leverage institutional resources to increase University brand awareness.

GOAL 3: *Strengthen public and private partnership management and promote accessibility and transparency across all areas of the institution.*

The university will revamp its website to improve transparency, providing clear and accessible access to policies, regulations, rules, and by-laws for both internal and external stakeholders. A robust methodology will also be developed to effectively evaluate and manage external partnerships, ensuring that collaborations align with the university's mission and deliver impactful results.

INITIATIVE 3.1 Modify Florida Poly's website for transparency and assessable access to policies, regulations, rules, by-laws, etc. to internal and external stakeholders.

INITIATIVE 3.2 Construct methodology to effectively evaluate and manage external partnerships.

PRIORITY THREE

ACADEMIC AND INDUSTRY COLLABORATIVE PARTNERSHIPS

OBJECTIVE: To enhance academic and industry partnerships at Florida Polytechnic University by strategically acquiring land and developing a cutting-edge research park.

GOAL 1: *Formulate and execute a plan to establish a University Research Park and a Center for Innovation and Entrepreneurship, creating a hub for cutting-edge research, industry collaboration, and entrepreneurial development.*

Florida Poly is dedicated to creating a University Research Park and a Center for Innovation and Entrepreneurship, establishing a hub where research, industry, and academia converge and collaborate. These initiatives will foster multi-disciplinary relationships between students, faculty, and industry leaders, driving innovation and accelerating technological advancements. The Research Park will serve as a catalyst for groundbreaking projects, attracting companies interested in cutting-edge research, while the Center for Innovation and Entrepreneurship will provide resources and support for aspiring entrepreneurs to bring their ideas to life. Together, these efforts will position Florida Poly as a leader in technological development and entrepreneurial success.

INITIATIVE 1.1 Investigate and secure surrounding land usage of Florida Poly purposed for a University research park and comprehensive live, work, and play area.

INITIATIVE 1.2 Launch a Center for Innovation and Entrepreneurship providing students with the resources, mentorship, and education needed to launch new ventures and drive entrepreneurial initiatives.

GOAL 2: *Strengthen industry collaboration across all divisions and strategically utilize the University's brand to foster impactful public and private partnerships that support educational excellence and the discovery, advancement, and application of knowledge in science, technology, engineering, and mathematics (STEM).*

Florida Poly is focused on building a vibrant ecosystem of research and industry collaboration through Information Technology (IT)-based partnerships and the development of industry-driven cooperative educational programs that equip students with practical skills for their careers. As a complement to this collaborative spirit, the President's speaker series will feature renowned thought-leaders and influencers to further connect students and faculty with industry experts and leading-edge ideas. By harnessing the Florida Poly brand, the university aims to forge new partnerships that drive innovation and expand opportunities across campus.

INITIATIVE 2.1 Develop robust academic and industry Information Technology (IT)-based strategic collaborations across all Florida Poly divisions and departments.

INITIATIVE 2.2 Collaborate with targeted industry partners to develop cooperative educational programs (professional development courses/certificate programs) and employee exchange programs.

INITIATIVE 2.3 Produce a President's speaker series to feature leaders and experts from industry, government, and STEM fields.

INITIATIVE 2.4 Raise brand awareness of Florida Poly and leverage relationships throughout the state to initiate new partnership disciplines.

CONCLUSION

Florida Polytechnic University is poised for an exciting leap forward and will elevate our status to become one of the nation’s elite STEM institutions. With unwavering commitment from our leadership and the entire campus community, we are united in our bold vision to drive transformation in academics, faculty excellence, student success, and campus operations during this pivotal period.

Fueled by a spirit of collaboration and innovation, Florida Poly is ready to become Florida's premier destination for high-tech degrees, addressing the skyrocketing demand for skilled professionals in high-wage, cutting-edge industries. This momentum will not only boost the university’s national reputation but will also position Florida as a leading force in the technology sector.

Florida Poly will bring this vision to life, executing the strategies and initiatives laid out in this plan with energy and precision. Together, we will set new standards for academic excellence, institutional achievement, and a mission of dynamic collaboration and connection that will extend well beyond our campus.

CITATIONS

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FLORIDA POLY[®]

Florida Polytechnic University
Board of Trustees
November 20, 2024

Subject: Florida Poly and BOG Legislative Budget Requests (LBRs)

Proposed Board Action

Information only – no action required.

Background Information

Recall, the Board of Trustees approved the 2025-2026 Legislative Budget Request (LBR) on July 29, 2024. This document is aimed at providing the Legislature with supporting information on our request of \$44,468,185 in capital requests (the next phase of funding for the Student Achievement Center project) and \$21,574,000 in additional, recurring operating funds to foster academic excellence, enhance student success, and significantly increase student enrollment. The proposal outlines three critical initiatives essential for achieving this growth: Student Success Enhancements, Student Recruitment to Elevate Enrollment, and Academic Program Innovation and Enhancement.

In addition, on September 18, 2024, the State University System of Florida Board of Governors approved the system's legislative budget request of \$4,845,188,691 consisting of 1) requested base appropriations to the universities & current performance initiatives and 2) incremental growth for 2025-26.

Supporting Documentation:

1. Florida Polytechnic University's approved State University System Education and General 2025-2026 Legislative Budget Request Forms I & II
2. State University System of Florida, Board of Governors approved Legislative Budget Request Executive Summary

Prepared by: Dr. Allen Bottorff, Vice President and Chief Financial Officer

**State University System
Education and General
2025-2026 Legislative Budget Request
Form I**

University(s):	Florida Polytechnic University
Request Title:	Rising to 3,000: Expanding Florida Poly's Impact
Date Request Approved by University Board of Trustees:	July 29, 2024
Recurring Funds Requested:	\$21,574,000
Non-Recurring Funds Requested:	\$0
Total Funds Requested:	\$21,574,000
Please check the request type below:	
Shared Services/System-Wide Request	<input type="checkbox"/>
Unique Request	<input checked="" type="checkbox"/>

I. Purpose –

- 1. Describe the overall purpose of the plan, specific goal(s) and metrics, specific activities that will help achieve the goal(s), and how these goals and initiatives align with strategic priorities and accountability plan established by each university (include whether this is a new or expanded service/program). If expanded, what has been accomplished with the current service/program?*
- 2. Describe any projected impact on academic programs, student enrollments, and student services.*

Florida Polytechnic University is committed to advancing Florida's economy by providing cutting-edge education and fostering research in science, technology, engineering, and mathematics (STEM). As part of a multi-year plan, the Florida Polytechnic University Strategic Plan aims to grow the campus from 1,600 students in Fall 2024 to 3,000 students by Fall 2030. The Florida Poly Legislative Budget Request (LBR) seeks to support the University's strategic initiatives aimed at fostering academic excellence, enhancing student success, and significantly increasing student enrollment. This proposal outlines three critical components essential for achieving this growth: Student Success Enhancements, Student Recruitment to Elevate Enrollment, and Academic Program Innovation and Enhancement. These initiatives collectively aim to enhance student support services, increase enrollment, and offer innovative academic programs in applied sciences, aligning with the University's strategic priorities and accountability plan.

Student Recruitment to Elevate Enrollment

In alignment with the strategic plan, Florida Polytechnic University seeks to enhance its recruitment, admissions, and marketing operations to double student enrollment by 2030. This growth is not just about increasing numbers; it's about enriching our community, enhancing the educational experience, and ensuring that we can offer the highest quality resources and opportunities to all students. By requesting \$3.5 million in recurring funding, the University plans to double the resources dedicated to enrollment and marketing efforts, fostering an environment where every student can succeed and thrive.

Student Success Enhancements

Florida Polytechnic University strives to prepare 21st-century leaders through a focus on innovation, problem-solving, and applied learning. This initiative emphasizes fostering a healthy, holistic student body, ensuring students are not only academically successful but also well-rounded individuals equipped with the resilience and skills necessary to thrive in a rapidly evolving world. By investing \$5 million in recurring funding for additional student support services and retention-focused initiatives, the University aims to create a supportive environment where every student can achieve their full potential. This investment is crucial for aligning with our mission and enhancing overall student well-being.

Academic Program Innovation and Enhancement

To contribute to Florida's high-tech economy, Florida Poly will continue to develop and offer innovative, high-quality academic programs in the applied sciences. Through a recurring investment of \$13 million, Florida Polytechnic University will recruit, hire, and support faculty to maintain an 18-to-1 student-faculty ratio as we grow enrollment to 3,000 students. This investment will also result in the development of new academic programs to produce graduates that will meet employer needs. These programs will increase Florida Poly's contribution to the areas of cybersecurity, fintech, artificial intelligence, and health care.

The combined impact of these initiatives on academic programs, student enrollments, and student services is substantial. Enhancing student support services and retention initiatives will lead to higher student satisfaction and success rates. Increased recruitment efforts will elevate enrollment numbers, enriching the student body and further supporting their academic and personal development. These initiatives are aligned with the strategic priorities and accountability plan of Florida Polytechnic University, ensuring a cohesive and comprehensive approach to campus growth and student development. These initiatives are aligned with Florida Poly's mission to foster innovation, problem-solving, and applied learning, producing graduates who are leaders in STEM fields.

II. Return on Investment - *Describe the outcome(s) anticipated, dashboard indicator(s) to be improved, or return on investment. Be specific. For example, if this issue focuses on improving retention rates, indicate the current retention rate and the expected increase in the retention rate. Similarly, if the issue focuses on expanding access to academic programs or student services, indicate the current and expected outcomes.*

Student Recruitment to Elevate Enrollment

Florida Poly's goal is to enhance our ongoing efforts in establishing the University as the premier STEM university in the southeastern region of the United States. Our overarching goal is to double enrollment to 3,000 students by the year 2030. This represents a 2x rate of growth over the next seven years. By Fall 2026, Florida Poly intends to hit a target of 2,400 students (a 50% increase over current enrollment). The University intends to accomplish this while retaining and improving the academic and professional quality of students, resulting in a higher number of enrolled students and a higher quality of graduating students.

To do so, Florida Poly requests \$3.5 million in recurring funds to increase digital media advertising; hire the appropriate number of admissions counselors and recruiters; advertise in publications throughout the southeastern United States; utilize billboard advertising; produce commercials for advertising on cable, streaming, and in movie theaters; and expand the marketing footprint to reach more than 100,000 prospective students.

Student Success Enhancements

Florida Polytechnic University will enhance the quality of student success programs and initiatives, resulting in a higher quantity of students and a higher quality of graduates entering the workforce and making a difference in society. By creating a campus culture that is a hub for STEM excellence, we directly support this mission. This environment not only attracts top-tier students and faculty but also facilitates groundbreaking innovations and collaborative projects that drive technological advancement.

Through an investment of \$5 million, we will increase the Academic Progression Rate from 70% to more than 80 over the course of two years. At the same time, we will improve the four-year graduation rate from 40% to more than 50% over the course of the next three years. We will measure success by analyzing Academic Progress Rate alongside student satisfaction with academic and non-academic support systems. We will (1) double student participation in co- and extra-curricular activities and (2) track success with a Student Participation Dashboard.

Academic Program Innovation and Enhancement

Florida Polytechnic University will enhance its existing academic programs and develop new academic programs to produce highly competent graduates that meet the needs of Florida's innovation economy. The investment of \$13 million recurring will produce an additional 400 bachelor's and master's degree graduates to fill employment gaps and generate new jobs for Florida.

III. Personnel – *Describe personnel hiring and retention plans, making sure to connect both plans to initiative(s) and goal(s) described in section I. State the amount of faculty FTE and staff FTE and estimated funding amounts used for retention and new hires in each category. In describing faculty hires, provide overall hiring goals, including academic area(s) of expertise and anticipated hiring level (e.g. assistant professor, associate professor, full professor). Please describe how funds used for faculty or staff retention will help the institution achieve its stated goals.*

Student Recruitment to Elevate Enrollment

The University needs to make several key hires to reach the goal of 3,000 students by 2030. The total cost of personnel is \$880,000. These roles are as follows:

- Marketing strategist (\$75,000/year)
- Two additional graphic designers (\$100,000/year)
- Digital media strategist (\$75,000/year)
- Three additional admissions counselors (\$180,000/year)
- Three additional recruiters (\$150,000/year)
- Web developer (\$90,000/year)
- Videographer (\$85,000/year)
- Office support (\$125,000/year)

Additionally, we need operational support funding to cover the escalated cost of reaching 2x the number of prospective students, admitted students, and enrolled students. The total cost of operational enhancements to double the enrollment is \$2,620,000. These costs are as follows:

- Publication advertising (\$495,000/year)
- Videography services (\$185,000/year)
- Commercials/streaming ads (\$160,000/year)
- Billboard advertisements (\$220,000/year)
- Event sponsorships (\$600,000/year)
- Postage (\$350,000/year)
- Viewbook production (\$160,000/year)
- Signage/campus décor (\$450,000/year)

The total cost of both personnel and operational enhancements is \$3,500,000.

Student Success Enhancements

Florida Polytechnic University needs to make several key hires to achieve the goals highlighted above. The total cost of personnel is \$1,340,000. These roles are as follows:

- 4 Academic success coaches (\$300,000/year)
- 4 Academic advisors (\$280,000/year)
- Associate director for student success (\$90,000/year)
- Associate director for accommodations (\$90,000/year)
- Student life coordinator (\$80,000/year)

- Athletic coaches (\$320,000/year)
- Administrative support (\$180,000/year)

Additionally, we need operational support funding to cover the escalated cost of meeting the goals highlighted above. The total cost of operational enhancements to double the enrollment is \$3,660,000. These costs are as follows:

- Targeted academic scholarships (\$1,000,000/year)
- Expanded marketing for student success initiatives (\$250,000/year)
- Athletic operational support (\$1,500,000/year)
- Program enhancements (\$400,000/year)
- Student success events (\$210,000/year)
- Student mentorship program (\$125,000/year)
- Tutoring support (\$175,000/year)

The total cost of both personnel and operational enhancements is \$5,000,000.

Academic Program Innovation and Enhancement

To offer innovative academic programs to grow the State's economy and to maintain an 18-to-1 student-faculty ratio, Florida Polytechnic University needs to hire highly qualified faculty and support staff. The total cost of personnel is \$10,485,000. The positions to hire are as follows:

- 70 faculty (\$7,735,000/year) in engineering and applied sciences
- 7 senior faculty / department chairs (\$1,183,000/year)
- Faculty development director (\$91,000/year)
- 4 Development, library, educational technology staff (\$319,000/year)
- 2 Lab technicians (\$130,000/year)
- Graduate program director (\$130,000/year)
- 2 Industry connection / capstone staff (\$182,000/year)
- 10 support staff – HR, finance, registrar, maintenance (\$650,000/year)
- Campus safety and hardening (\$65,000/year)

We will also need operational funding to support to develop new and enhance existing academic programs of excellence. The total cost of operational enhancements to achieve enrollment goals is \$2,589,000. This investment will be used for the following purposes:

- Faculty development funding (\$100,000/year)
- Faculty research (\$120,000/year)
- Instructional technology, online learning platform (\$150,000/year)
- Faculty and staff search and onboarding costs (\$246,000/year)
- OPS support and graduate assistants (\$335,000/year)
- New program market research and positioning (\$75,000/year)
- New program development (\$125,000/year)

- Existing program enhancements – lab equipment, NSA accreditation, first-year curriculum, design sequence, capstone experience (\$1,200,000/year)
- Industry connections (\$150,000/year)
- Equipment refresh (\$88,000/year)

The total cost of both personnel and operational enhancements is \$13,074,000.

IV. Facilities *(If this issue requires an expansion or construction of a facility, please complete the following table.):*

	Facility Project Title	Fiscal Year	Amount Requested	Priority Number
1.	Student Achievement Center (PECO)	FY 25-26	\$44,468,185	

2025-2026 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

University: Florida Polytechnic University
Issue Title: Student Recruitment to Elevate Enrollment

	RECURRING	NON-RECURRING	TOTAL
<hr/>			
<u>Positions</u>			
Faculty	0.00	0.00	0.00
Other (A&P/USPS)	14.00	0.00	14.00
	-----	-----	-----
Total	14.00	0.00	14.00
	=====	=====	=====
Salaries and Benefits	\$880,000	\$0	\$880,000
Other Personal Services	\$785,000	\$0	\$785,000
Expenses	\$875,000	\$0	\$875,000
Operating Capital Outlay	\$960,000	\$0	\$960,000
Electronic Data Processing	\$0	\$0	\$0
Financial Aid	\$0	\$0	\$0
Special Category (Specific)	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
	\$0	\$0	\$0
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Total All Categories	\$3,500,000	\$0	\$3,500,000
	=====	=====	=====

2025-2026 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

University: Florida Polytechnic University
Issue Title: Student Success Enhancements

	<u>RECURRING</u>	<u>NON- RECURRING</u>	<u>TOTAL</u>
<u>Positions</u>			
Faculty	0.00	0.00	0.00
Other (A&P/USPS)	19.00	0.00	19.00
	-----	-----	-----
Total	19.00	0.00	19.00
	=====	=====	=====
Salaries and Benefits	\$1,340,000	\$0	\$1,340,000
Other Personal Services	\$300,000	\$0	\$300,000
Expenses	\$460,000	\$0	\$460,000
Operating Capital Outlay	\$1,900,000	\$0	\$1,900,000
Electronic Data Processing	\$0	\$0	\$0
Financial Aid	\$0	\$0	\$0
Special Category (Specific)	\$0	\$0	\$0
Scholarships	\$1,000,000	\$0	\$1,000,000
	\$0	\$0	\$0
	\$0	\$0	\$0
	-----	-----	-----
Total All Categories	\$5,000,000	\$0	\$5,000,000
	=====	=====	=====

2025-2026 Legislative Budget Request
Education and General
Position and Fiscal Summary
Operating Budget Form II
(to be completed for each issue)

University: Florida Polytechnic University
Issue Title: Academic Program Innovation & Enhancement

	RECURRING	NON-RECURRING	TOTAL
<u>Positions</u>			
Faculty	78.00	0.00	78.00
Other (A&P/USPS)	18.00	0.00	18.00
	-----	-----	-----
Total	96.00	0.00	96.00
	=====	=====	=====
Salaries and Benefits	\$10,485,000	\$0	\$10,485,000
Other Personal Services	\$485,000	\$0	\$485,000
Expenses	\$421,000	\$0	\$421,000
Operating Capital Outlay	\$1,563,000	\$0	\$1,563,000
Electronic Data Processing	\$0	\$0	\$0
Financial Aid	\$0	\$0	\$0
Special Category (Specific)	\$0	\$0	\$0
Faculty research	\$120,000	\$0	\$120,000
	\$0	\$0	\$0
	\$0	\$0	\$0
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Total All Categories	\$13,074,000	\$0	\$13,074,000
	=====	=====	=====

State University System of Florida
Education and General
2025-2026 Executive Summary, Universities and Special Units
September 18, 2024

		Recommendation
1	2024-2025 Total State Appropriation - Adjusted for Start-up	
2	State Support	\$3,859,730,338
3	Performance-Based Funding - State Investment	\$0
4	Performance-Based Funding - Institutional Investment	\$295,000,000
5	2024-2025 Beginning Base - State Support	\$4,154,730,338
6		
7	<u>2025-2026 Budget Issues:</u>	
8	Performance Incentives	
9	Performance-Based Funding Incentives	\$400,000,000
10	Preeminence Funding	\$140,000,000
11	Performance-Based Recruitment & Retention Initiative	\$100,000,000
12	Other Initiatives	
13	Cybersecurity Resiliency Program	\$20,000,000
14	PSE Waiver Incentive Funding	\$20,924,303
15	UF-IFAS Extension Workload Initiative	\$6,409,740
16	State Fire Marshal Inspections	\$3,124,310
17	<i>Incremental Growth for 2025-2026</i>	\$690,458,353
18		
19	Total 2025-2026 E&G Budget Request	\$4,845,188,691

Florida Polytechnic University
Board of Trustees Annual Retreat
November 19, 2024

Subject: Legislative Plan and Advocacy

Proposed Board Action

Information only – no action required.

Background Information

This item is to provide the Board of Trustees with an overview of the Legislative Advocacy Plan for the upcoming 2025 Legislative Session and discuss how Board trustees can assist with advocacy.

Supporting Documentation: N/A

Prepared by: Kelli Stargel, Associate VP of Strategic Relationships