Arizona Economic outlook

Moody’s, Standard & Poor’s both revised Arizona’s outlook from stable to positive. The ratings services cited job growth and positive General Fund balances in the upgrade.

September 2013: Forbes magazine predicts Arizona will lead the nation in future job growth because of its favorable business climate.

Moody’s Analytics: The fastest job growth of any state: 3% annually over the next five years.

These job gains are projected to boost household incomes 3.6% annually through 2017--second best in the U.S. after Illinois.

Fastest-growing sectors: construction, leisure/hospitality industries, financial activities, education and health services.

The state’s economic growth, which Moody’s forecasts to expand at a U.S.-best 4.6% annually.

Western states dominate the best states for projected job growth. Only two, Florida and Georgia, of the top 10 are located east of the Mississippi River.
Summary of Current Budget Status

- FY ‘13 ending balance was $200 M more than expected
- Annual base revenue is projected to grow by only 3.5% in FY ‘14 due to a decline in capital gain taxes – will be reevaluated throughout the year
- FY ’15 – FY ’17 annual revenues would increase by over 5%
- On-going spending above projected revenues – carry forward keeps budget balanced in FY ‘14 and FY ’15
- Projected annual shortfalls of $(200) M in FY ‘16 and $(300) M in FY ‘17
NEVER SETTLE

THE STRATEGIC ACADEMIC AND BUSINESS PLAN FOR THE UNIVERSITY OF ARIZONA

President Ann Weaver Hart
ABOR 2020 Goals

FY 2020 figures (outer ring) are Enterprise targets. Actual figures (inner ring) reflect the most current data available for each metric. The data rings are color-coded as follows: **2012-13 Actuals** and **2008-2009 Actuals**.

- Undergraduate Enrollment: 39,630
- Research Expenditures: $1,200 Million
- Annual Bachelor’s: 8,100
- Freshmen Retention: 89%
- 6-year Graduation: 65%
- Comm College Transfers: 3,000
- Comm College to Bachelor’s: 2,000
- Online Degrees: 1,000
- Online Degrees: 1,000
- Annual Bachelor’s: 8,100
- Freshmen Retention: 89%
- 6-year Graduation: 65%
- Comm College Transfers: 3,000
- Comm College to Bachelor’s: 2,000
- Online Degrees: 1,000
Building Faculty of the Future

- Redesign the University to avoid isolation in ever-narrowing disciplines
- Improve campus infrastructure to promote diversity at all levels, focusing on accountability
- Create progressive promotion and tenure guidelines
- Optimize post-tenure review and workload
- Implement leadership training and professional development programs
Advancing Structure and Management

Continue the shift to a broader school model from the narrower department model

Elevate interdisciplinary collaborations

Manage programs for excellence with peer benchmark data and analytics
Shaping Academic Programs

**Redesign** academic units and degree programs for size, strength, opportunity, and resources

**Shift** academic units into teams of teaching and research specialists

**Select** areas of study ripe for growth in workforce needs and national competitiveness
Remade: Three Example Programs

School of Middle Eastern and North African Studies

School of Animal and Comparative Biomedical Sciences

The School of Information (iSchool)
Changing How We Run Our Internal Business

A transparent business model that rewards productivity, effectiveness, and entrepreneurship

- Fully replace the incremental budget model with an incentive-based model
- Integrate clear budgeting of costs and revenues to enhance research and instructional performance
- Adopt business plans for units, programs, and initiatives
Enrolling More Learners Each Year

Fall 2014–Fall 2020

*Online enrollment includes both resident and non-resident undergraduates and graduates
## The University of Arizona
### Business Plan FY2015-FY2023
#### Modeled Enrollment Results

<table>
<thead>
<tr>
<th>Enrollment -- Head Counts (Fall)</th>
<th>FY08</th>
<th>FY09</th>
<th>FY10</th>
<th>FY11</th>
<th>FY12</th>
<th>FY13</th>
<th>FY14</th>
<th>FY15</th>
<th>FY16</th>
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<tr>
<td>Undergraduate</td>
<td></td>
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<td>Resident</td>
<td>20,068</td>
<td>20,345</td>
<td>20,808</td>
<td>21,062</td>
<td>20,984</td>
<td>21,520</td>
<td>21,548</td>
<td>21,408</td>
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<td>22,072</td>
<td>22,727</td>
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<td>Non-resident</td>
<td>9,002</td>
<td>9,374</td>
<td>9,538</td>
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<td>10,373</td>
<td>10,573</td>
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<td>11,505</td>
<td>12,107</td>
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<td>Graduate</td>
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<td>8,338</td>
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<td>8,494</td>
<td>8,571</td>
<td>8,658</td>
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<td>8,850</td>
<td>8,900</td>
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<td>Resident</td>
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<td>4,057</td>
<td>4,432</td>
<td>4,560</td>
<td>4,478</td>
<td>4,728</td>
<td>4,750</td>
<td>4,775</td>
<td>4,800</td>
<td>4,825</td>
<td>4,850</td>
<td>4,875</td>
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<td>Non-resident</td>
<td>4,313</td>
<td>4,281</td>
<td>3,989</td>
<td>3,934</td>
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<td>4,025</td>
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<td>Total</td>
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<td>38,057</td>
<td>38,767</td>
<td>39,086</td>
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<td>41,374</td>
<td>42,427</td>
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<td>45,274</td>
<td>46,900</td>
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<td>Undergraduate NR % of Total Undergraduate</td>
<td>31.0%</td>
<td>31.5%</td>
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<td>31.6%</td>
<td>31.8%</td>
<td>32.5%</td>
<td>33.1%</td>
<td>33.7%</td>
<td>34.3%</td>
<td>34.8%</td>
<td>35.1%</td>
<td>35.5%</td>
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<tr>
<td>Graduate NR % of Total Graduate</td>
<td>52.9%</td>
<td>51.3%</td>
<td>47.4%</td>
<td>46.3%</td>
<td>47.8%</td>
<td>45.4%</td>
<td>45.4%</td>
<td>45.6%</td>
<td>45.5%</td>
<td>45.5%</td>
<td>45.5%</td>
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<td>45.6%</td>
</tr>
<tr>
<td>Non-resident % of Total Fall Enrollments</td>
<td>35.8%</td>
<td>35.9%</td>
<td>34.9%</td>
<td>34.4%</td>
<td>35.1%</td>
<td>34.7%</td>
<td>35.3%</td>
<td>35.7%</td>
<td>36.2%</td>
<td>36.6%</td>
<td>36.9%</td>
<td>37.2%</td>
<td>37.4%</td>
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<td>Online Enrollments</td>
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<td>2,657</td>
<td>3,075</td>
<td>3,611</td>
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<tr>
<td>Total Enrollments with New Online Programs</td>
<td>42,437</td>
<td>43,278</td>
<td>43,906</td>
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<td>44,831</td>
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</tbody>
</table>
Learners Who Earn Degrees

Number of Bachelor’s Degrees Awarded

- Actual
- Peer Median
Expanding Online

- Use data from external market research on **online growth opportunities**
- Capitalize on **signature programs**
- Create opportunities for students to **complete degrees and shorten overall time to degree**
- **Explicitly integrate** online into overall enrollment goals
- Increase transfer enrollment
Meeting Our Transfer Goals

Articulated Pathways Established with Arizona Community Colleges

- Establish a Transfer Enrollment Team
- Complete bridge agreements with all community colleges in the state
- Expand our relationships
- Create upper-division online options for degree completion based on market needs
Real World Expectations

Preparing Students for The Job Market

**Translate** formal academic experience to an applied setting:
- ✓ Civic engagement
- ✓ Research, scholarship, and creative engagement
- ✓ Global engagement
- ✓ Internship and practicum

Formalize learning experiences to ensure that every student is **real world ready** and **sought after** by the best employers and postgraduate programs.
Research Expenditures Plan

- ABOR Peer Median
- Actual
- Goal
- Plan

- 200M
- 400M
- 600M
- 800M
- 1000M
- 1200M

- 2008 - 2023
DIMENSION 1: COLLEGE CONTRIBUTIONS

We need to identify our share of the task

Goal

ABOR Peer Median

Actual

We

$200M
$400M
$600M
$800M
$1000M
$1200M

$0M
$200M
$400M
$600M
$800M
$1000M
$1200M

DIMENSION 2: Strategic initiatives

The graph illustrates the progression of strategic initiatives over a period from 2008 to 2023. It shows the actual progress (darker line) and compares it with the median and peer group's performance. The goal is represented by the red line.
UA Research Portfolio

Estimated Agency Funding Available (FY13)

- Defense
- Energy
- HHS/NIH
- NASA
- NSF
- USDA

% of Peer Median Funding at UA
<table>
<thead>
<tr>
<th>Goals</th>
<th>Methods</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achieve faculty flexibility and accountability</td>
<td>Flexible workload models, revised P&amp;T guidelines</td>
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<tr>
<td>Successfully compete for more large and complex awards</td>
<td>Research support office, Research Gateway portal, PIVOT/SCIVAL, core infrastructure</td>
</tr>
<tr>
<td>Eliminate speed bumps</td>
<td>Streamline contracting, responsible conduct of research procedures</td>
</tr>
<tr>
<td>Ensure that space is used efficiently</td>
<td>Benchmark productivity, determine build/renovate</td>
</tr>
<tr>
<td>Develop partnerships to finance large projects</td>
<td>Public-private partnerships, shared investment</td>
</tr>
</tbody>
</table>
Achieving Higher Productivity

Goal

Investment: Research support Core infrastructure

ABOR Peer Median

Higher Productivity

Actual

<table>
<thead>
<tr>
<th>Year</th>
<th>Goal</th>
<th>Actual</th>
<th>ABOR Peer Median</th>
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<tr>
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<td>2022</td>
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<td>2023</td>
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</table>
Sample Research Accomplishments

- **OSIRIS-REx**
  - $800 million (NASA)

- **iPlant**
  - $100 million (NSF)

- **CLIMAS climate assessment of the Southwest**
  - $14.9 million (NOAA)

- **Cybersecurity**
  - $14.7 million (DHS)

- **Tucson children’s respiratory study**
  - $8 million (NIH)
We have selected seven areas where UA has the ability, desire, and potential resources.

- Doubling research appears to be highly feasible
- Cross-cutting
- Aligned with known research strengths
- Tied to specific grant and contract opportunities
Building on Our Strengths

Defense and Security
Space Systems
Water and the Arid Environment

Population Health and Health Outcomes
Healthcare Disparities
Precision Health
Neuroscience

SPACE & OPTICS
ENVIRONMENT
TRANSLATIONAL BIOMEDICAL
IMAGING AND INFORMATICS
Despite the NIH budget plateau, this remains a substantial pool of resources for growing the biomedical research enterprise.
DIMENSION 2: Strategic initiatives

Increased Productivity Invest in Research Support+ Core Infrastructure

New Faculty Hires

- Water/Arid Environment: 60
- Population Health: 44
- Clinical Trials: 25
- Space Systems: 64
- Healthcare Disparities: 35
- Defense and Security: 62
- Precision Health: 50
- Higher Productivity
- Neurosciences: 40

Goal
Business Plan: Key Assumptions

✓ Growth in both traditional and non-traditional enrollments
✓ Growth in extramural research funding
✓ Growth in private giving, including a major capital campaign
✓ Increased faculty research productivity
✓ Additional research facilities and infrastructure
✓ Ongoing investment by the state in operating and capital support
The University of Arizona
Business Plan FY2015-2023

1. General Fund revenue growth assumed to be funded according to FY2015 Budget Request Plan $34M. Future years are based upon funding of Performance Funding Formula—SCH & Degrees, and Research @ 100% Enterprise metric goals. Assumes the State funds 50% of Performance Funding Model.


3. Traditional Fall/Spring enrollments growth to 46,900 and online student growth to 7,500, totaling 54,400 students as per Student Affairs October 2013 plan (Enterprise Metric goal is 49,900).

4. Tuition rate increase 2% per year.

5. Institutional aid percentage reduction as per Student Affairs August 2013 Plan (to 24% of gross tuition & fee revenues).

6. Sponsored grant activity growth per Research Plan C which adds additional 350 faculty by FY2023. Estimated $1.2B NSF Research Activity by FY 2023. Increasing research productivity of faculty to $625k/faculty (up from current level of $405k/faculty).

7. Includes 3% per year growth in private grants/contracts associated with the medical enterprise.

8. Private gift growth 4% per year plus additional $80M/yr from capital gift campaign FY2016-FY2020.

9. Auxiliary growth at 4% per year.

10. Assumes receipt of gifts according to capital plan.

11. General salary growth 2% per year.

12. Includes 350 additional faculty by FY2023 for growth in student enrollments and the growth in Research (Plan C).

13. Benefits rate growth for health care at 5% per year.


15. Non-salary expenditure growth @ 4% for cost of goods sold, 3% utilities, 3% all other.


17. Includes capital projects currently active (i.e., Old Main, Environment & Natural Resources 2, Phoenix Health Science Shell Space, and Phoenix Cancer Center).

18. Includes Research Infrastructure Plan $450M.


20. Building renewal at $4M for FY2014, and increase $2M per year to total of $16M for FY2020 and future years (capitalized renovations).


22. 15% of Research Start-up costs are capitalized as equipment purchase.
UA Strategic Planning and plan implementation how this affects us.

- Assigning metrics (Phase IV)
- Tracking achievement (Phase V)
Research expenditures, all accts: **Higher productivity only**
DIMENSION 2: Strategic initiatives

Increased Productivity Invest in Research Support+ Core Infrastructure

New Faculty Hires

- Water/Arid Environment
- Space Systems
- Defense and Security
- Higher Productivity
- Population Health
- Healthcare Disparities
- Clinical Trials
- Precision Health
- Neurosciences


- Goal
- Median
- Actual

$1000M
$800M
$600M
$400M
$200M
0
### ESTIMATE OF CALS SHARE OF CALS ABOR TARGETS FROM MISSION DIRECTORS

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<td>729</td>
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<td>730</td>
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<tr>
<td>6-Year Graduation Rate</td>
<td>55.10%</td>
<td>57.40%</td>
<td>62.80%</td>
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<td>61.20%</td>
<td>61.80%</td>
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<td>64.20%</td>
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<td>4-Year Graduation Rate</td>
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<td>49.00%</td>
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<tr>
<td>Undergraduate Enrollment (Official 21st Day)</td>
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<td>2876</td>
<td>2894</td>
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<td>3306</td>
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<td>Total Enrollment (Official 21st Day)</td>
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<td>3275</td>
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<td>Number of Master's Degrees Awarded</td>
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<td>Number of Doctoral Degrees Awarded</td>
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**SUM OF FIRST ITERATION OF UNITS' ABOR METRICS TARGETS**

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<td>6-Year Graduation Rate</td>
<td>58.34%</td>
<td>56.91%</td>
<td>54.47%</td>
<td>56.71%</td>
<td>56.98%</td>
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<td>54.42%</td>
<td>56.12%</td>
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<td>56.51%</td>
<td>57.43%</td>
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<td>4-Year Graduation Rate</td>
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<td>76.33%</td>
<td>65.14%</td>
<td>75.82%</td>
<td>76.60%</td>
<td>77.29%</td>
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<td>78.48%</td>
<td>78.05%</td>
<td>78.48%</td>
<td>78.05%</td>
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<td>Undergraduate Enrollment (Official 21st Day)</td>
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<td>Total Enrollment (Official 21st Day)</td>
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<td>5243</td>
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<td>Number of Master's Degrees Awarded</td>
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<td>135</td>
<td>142</td>
<td>152</td>
<td>160</td>
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<td>172</td>
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<td>174</td>
<td>174</td>
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<tr>
<td>Number of Doctoral Degrees Awarded</td>
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<td>49</td>
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<td>50</td>
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</table>

**SUMMARY OF FIRST ITERATION OF UNITS’ ABOR METRICS TARGETS**

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<tbody>
<tr>
<td>Research &amp; Development Expenditures (in $1,000s)</td>
<td>28,838</td>
<td>27,437</td>
<td>31,375</td>
<td>31,229</td>
<td>29,541</td>
<td>28,130</td>
<td>27,768</td>
<td>29,608</td>
<td>32,244</td>
<td>35,400</td>
<td>38,878</td>
<td>42,663</td>
<td>46,522</td>
<td>50,982</td>
<td>55,820</td>
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<td>Undergraduate Education</td>
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<td>65,222</td>
<td>68,733</td>
<td>69,710</td>
<td>70,223</td>
<td>68,869</td>
<td>66,565</td>
<td>70,382</td>
<td>76,650</td>
<td>84,150</td>
<td>92,420</td>
<td>101,416</td>
<td>110,581</td>
<td>120,854</td>
<td>132,692</td>
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<td>Graduate Health Professions &amp; Related (ACBS, NSC, FSHO)</td>
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<td>34</td>
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<td>34</td>
<td>34</td>
<td>34</td>
<td>34</td>
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<tr>
<td>Workforce &amp; Community</td>
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<td>12,409</td>
<td>13,844</td>
<td>14,971</td>
<td>15,272</td>
<td>15,576</td>
<td>15,887</td>
<td>16,205</td>
<td>16,529</td>
<td>16,860</td>
<td>17,197</td>
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<tr>
<td>Expenditures Related to Service and Engagement Activities (in $1,000s)</td>
<td>25,632</td>
<td>26,721</td>
<td>30,797</td>
<td>30,320</td>
<td>34,424</td>
<td>35,112</td>
<td>35,815</td>
<td>36,531</td>
<td>37,262</td>
<td>38,007</td>
<td>38,767</td>
<td>39,542</td>
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### UNITS’ MINUS CALS’ ABOR METRICS TARGETS

#### Arizona Board of Regents METRIC at 10/15/2012

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<tr>
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<tbody>
<tr>
<td>Number of Bachelor’s Degrees Awarded</td>
<td>(6)</td>
<td>66</td>
<td>64</td>
<td>17</td>
<td>17</td>
<td>31</td>
<td>31</td>
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<td>49</td>
<td>52</td>
<td>53</td>
<td>71</td>
<td>76</td>
<td>77</td>
<td>76</td>
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<tr>
<td>6-Year Graduation Rate</td>
<td>3.34%</td>
<td>-1.49%</td>
<td>-18.33%</td>
<td>-5.89%</td>
<td>-12.22%</td>
<td>-8.87%</td>
<td>-8.72%</td>
<td>-8.59%</td>
<td>-8.48%</td>
<td>-8.39%</td>
<td>-8.29%</td>
<td>-7.57%</td>
<td>-6.87%</td>
<td>-6.27%</td>
<td>-5.69%</td>
</tr>
<tr>
<td>Freshman Retention Rate</td>
<td>-15.62%</td>
<td>-13.56%</td>
<td>-6.07%</td>
<td>-6.81%</td>
<td>-6.97%</td>
<td>-19.08%</td>
<td>-9.28%</td>
<td>-9.40%</td>
<td>-9.66%</td>
<td>-9.78%</td>
<td>-9.78%</td>
<td>-10.03%</td>
<td>-9.92%</td>
<td>-9.92%</td>
<td>-10.39%</td>
</tr>
<tr>
<td>Undergraduate Enrollment (Official 21st Day)</td>
<td>1,147</td>
<td>1,061</td>
<td>1,126</td>
<td>1,227</td>
<td>1,214</td>
<td>1,285</td>
<td>1,418</td>
<td>1,669</td>
<td>1,978</td>
<td>2,046</td>
<td>2,142</td>
<td>2,223</td>
<td>2,204</td>
<td>2,166</td>
<td>2,071</td>
</tr>
<tr>
<td>Total Enrollment (Official 21st Day)</td>
<td>1,174</td>
<td>1,133</td>
<td>1,178</td>
<td>1,226</td>
<td>1,292</td>
<td>1,323</td>
<td>1,178</td>
<td>1,403</td>
<td>1,962</td>
<td>1,827</td>
<td>1,866</td>
<td>2,028</td>
<td>2,071</td>
<td>2,071</td>
<td>2,071</td>
</tr>
<tr>
<td>Number of Master’s Degrees Awarded</td>
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<td>(8)</td>
<td>5</td>
<td>8</td>
<td>9</td>
<td>5</td>
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<td>7</td>
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<td>9</td>
</tr>
<tr>
<td>Number of Doctoral Degrees Awarded</td>
<td>7</td>
<td>6</td>
<td>5</td>
<td>5</td>
<td>5</td>
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<td>2</td>
<td>7</td>
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</tbody>
</table>

#### Research Excellence

| Research & Development Expenditures (in $1,000s) - Res depths only, SPs acts only | (2,162) | (2,278) | (1,631) | (1,421) | (4,613) | (2,208) | (2,247) | (2,755) | (4,219) | (8,171) | (8,408) | (11,216) |
| Research & Development Expenditures (in $1,000s) - Res depths only, all acts | (11,470) | (11,390) | (11,085) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) | (11,069) |
| Expenditures Related to Service and Engagement Activities (in $1,000s) - Ext depths only, SPs acts only | (3,912) | (3,182) | (6,761) | (7,565) | (8,929) | (8,955) | (8,760) | (9,914) | (8,693) | (10,117) | (10,347) | (10,677) |
| Expenditures Related to Service and Engagement Activities (in $1,000s) - Ext depths only, all acts | (18,693) | (18,934) | (19,095) | (19,468) | (23,129) | (24,093) | (24,430) | (24,826) | (25,251) | (25,781) | (26,386) | (26,869) |

### SUM OF INVESTMENT NEEDED TO REACH METRIC TARGETS

#### Arizona Board of Regents METRIC at 10/15/2012

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<td>2,204</td>
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<tr>
<td>Number of Master’s Degrees Awarded</td>
<td>(7)</td>
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</tr>
<tr>
<td>Number of Doctoral Degrees Awarded</td>
<td>7</td>
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<td>5</td>
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<td>7</td>
<td>9</td>
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</table>
## Budgeted and Actual College Financial Position as of Jan-21-2014

### College BUDGETED Perm

<table>
<thead>
<tr>
<th></th>
<th>FY14 CALS</th>
<th>FY15 CALS</th>
<th>FY16 CALS</th>
<th>FY17 CALS</th>
<th>FY18 CALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1 permanent funding carryover</td>
<td>1,878,751</td>
<td>135,977</td>
<td>(194,523)</td>
<td>(294,523)</td>
<td>(344,523)</td>
</tr>
<tr>
<td>Vacancy Savings (primarily T/C faculty)</td>
<td>1,000,000</td>
<td>800,000</td>
<td>800,000</td>
<td>800,000</td>
<td>800,000</td>
</tr>
<tr>
<td>Positions filled/to be filled in FY, per hiring plan</td>
<td>(1,485,174)</td>
<td>(815,000)</td>
<td>(636,050)</td>
<td>(607,500)</td>
<td>(700,000)</td>
</tr>
<tr>
<td>Previous hires needing perm salary/ERE$</td>
<td>717,193</td>
<td>(315,500)</td>
<td>(263,950)</td>
<td>(242,500)</td>
<td>(150,000)</td>
</tr>
<tr>
<td>Budget cut from college salary/ERE funds</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
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<tr>
<td>Perm commitments from TC List (PS/ERE only)</td>
<td>(540,407)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>135,977</strong></td>
<td><strong>(194,523)</strong></td>
<td><strong>(294,523)</strong></td>
<td><strong>(344,523)</strong></td>
<td><strong>(394,523)</strong></td>
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</tbody>
</table>

### College ACTUAL Perm

<table>
<thead>
<tr>
<th></th>
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<th>FY15 CALS</th>
<th>FY16 CALS</th>
<th>FY17 CALS</th>
<th>FY18 CALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>7/1 permanent funding carryover</td>
<td>1,878,751</td>
<td>116,078</td>
<td>(214,422)</td>
<td>(314,422)</td>
<td>(364,422)</td>
</tr>
<tr>
<td>Vacancy Savings (primarily T/C faculty)</td>
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<td>800,000</td>
<td>800,000</td>
</tr>
<tr>
<td>Positions filled/to be filled in FY, per hiring plan</td>
<td>(1,485,174)</td>
<td>(815,000)</td>
<td>(636,050)</td>
<td>(607,500)</td>
<td>(700,000)</td>
</tr>
<tr>
<td>Previous hires needing perm salary/ERE$</td>
<td>717,193</td>
<td>(315,500)</td>
<td>(263,950)</td>
<td>(242,500)</td>
<td>(150,000)</td>
</tr>
<tr>
<td>Budget cut from college salary/ERE funds</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Perm commitments from TC List (PS/ERE only)</td>
<td>(540,407)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>116,078</strong></td>
<td><strong>(214,422)</strong></td>
<td><strong>(314,422)</strong></td>
<td><strong>(364,422)</strong></td>
<td><strong>(414,422)</strong></td>
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### Perm Actual to Budget Variance

<table>
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<th>FY15 CALS</th>
<th>FY16 CALS</th>
<th>FY17 CALS</th>
<th>FY18 CALS</th>
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<tbody>
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<td>Perm Actual to Budget Variance</td>
<td>(19,899)</td>
<td>(19,899)</td>
<td>(19,899)</td>
<td>(19,899)</td>
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# Budgeted and Actual College Financial Position as of Jan-21-2014

## College BUDGETED Temp

<table>
<thead>
<tr>
<th></th>
<th>FY14 CALS</th>
<th>FY15 CALS</th>
<th>FY16 CALS</th>
<th>FY17 CALS</th>
<th>FY18 CALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>College-level all-funds starting budget</td>
<td>6,740,709</td>
<td>4,058,733</td>
<td>3,478,233</td>
<td>3,378,233</td>
<td>3,328,233</td>
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<tr>
<td>College-level all-funds revenue (actual)</td>
<td>1,657,234</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>College-level all-funds revenue (expected)</td>
<td>408,904</td>
<td>1,560,000</td>
<td>1,560,000</td>
<td>1,560,000</td>
<td>1,560,000</td>
</tr>
<tr>
<td>College-level approved commitments (actual)</td>
<td>(5,308,552)</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>College-level approved commitments (expected)</td>
<td>(1,018,342)</td>
<td>(5,931,750)</td>
<td>(5,765,000)</td>
<td>(5,765,000)</td>
<td>(5,765,000)</td>
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<tr>
<td>Balance available</td>
<td>2,479,953</td>
<td>(313,017)</td>
<td>(726,767)</td>
<td>(826,767)</td>
<td>(876,767)</td>
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</table>

## College ACTUAL Temp

<table>
<thead>
<tr>
<th></th>
<th>FY14 CALS</th>
<th>FY15 CALS</th>
<th>FY16 CALS</th>
<th>FY17 CALS</th>
<th>FY18 CALS</th>
</tr>
</thead>
<tbody>
<tr>
<td>College-level all-funds starting budget</td>
<td>6,740,709</td>
<td>3,649,829</td>
<td>3,069,329</td>
<td>2,969,329</td>
<td>2,919,329</td>
</tr>
<tr>
<td>College-level all-funds revenue (actual)</td>
<td>1,657,234</td>
<td>0</td>
<td>0</td>
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</tr>
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<td>College-level all-funds revenue (expected)</td>
<td>0</td>
<td>1,560,000</td>
<td>1,560,000</td>
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<td>(5,765,000)</td>
<td>(5,765,000)</td>
<td>(5,765,000)</td>
</tr>
<tr>
<td>Balance available</td>
<td>2,071,049</td>
<td>(721,921)</td>
<td>(1,135,671)</td>
<td>(1,235,671)</td>
<td>(1,285,671)</td>
</tr>
</tbody>
</table>

## Temp Actual to Budget Variance

<p>| | | | | | |</p>
<table>
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<tr>
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<tbody>
<tr>
<td></td>
<td>(408,904)</td>
<td>(408,904)</td>
<td>(408,904)</td>
<td>(408,904)</td>
<td>(408,904)</td>
</tr>
</tbody>
</table>
Many Faces of CAS

Joy Winzerling
Bart Cardon Associate Dean for Academic Programs and Career Development
ROAD MAP TO THIS PRESENTATION

CURRENT SITUATION IN EDUCATION & AGENDAS

WHAT WE ARE DOING AND WHO IS DOING WHAT

THE NEW CALS CAREERS CENTER
CONSIDER THIS

- Everyone who will enter the labor force in the next 25 years has already been born.
  
  Decrease in numbers of high school graduates
  Increase in numbers of minority students

- Right now new graduates are technically prepared and inept in career skills.

- In ALS sectors already thousands of jobs unfilled; projected shortfall is 55,000 in 10 yr.
  
  Industry hires only suitable candidates
  Technically skilled graduates without career skills will have difficulty finding a job

- Nationally colleges are offering career skills training and programs

- Increase Competition for Students

We are training the people who will be in control in our lifetime.

- Steep Competition for Highly Skilled Graduates
National Agenda for Higher Ed

Emphasis

• Developing Career Skills and Job Placement
• Experiential Learning and Internships
• Certificates and Badges to Strengthen Degrees
• Distance and Migratory Learning
• Competency Based Education
• New Instruction Methodologies/Blended Approach
• Decreased Time To Graduation/Decreased Cost for Degree

ARIZONA

52% of HS Grads go on to higher education
17% of HS Grads get a BS degree six years post graduation
UA Agenda

100% Engagement: Experiential Learning

Increase Distance Learning: ~7500 Students in Online Programs

Seamless Transfer by Articulation with Community Colleges

Recruit to Retain and Graduate
FOCUS ON THE QUALITY OF THE CALS STUDENT EXPERIENCE
EMPHASIS ON ACCESS AND ENGAGEMENT

WHAT ARE WE DOING ABOUT IT?

GET
Recruitment
Orientation

KEEP
Advising
Retention
Internships
Scholarships

TRAIN
Instruction
Curriculum
Career Preparation
Recruitment

Frank Santiago and Kayla Nelson
CALS Ambassadors
Recruitment

Frank Santiago and Kayla Nelson
Ambassadors

Attend more than 120 high school events; reach over 9000 students
Attend 60 events for Community Colleges; contact ~5000 students
Attend 20-30 events for UA Students; particularly to reach the undecided students
Attend 10-15 events for Middle School students; 500-600 student contacts

Enrollment Numbers
Orientation

Elaine Marchello & Nancy Rodriguez Lorta

Contact with over 400 incoming freshman
Advising
Nancy Rodriguez Lorta

Mentoring
Kristen Geary

Retention
Maria Bueno

Advise over 180 students per year.
Mentor ~250 at risk students per year
Coordinate College AgVisors

Peer mentors: 18-25; 3 mentees/mentor (new or at risk)
AgVisors: Ag and Life Science Advisors

TAKING CARE OF OUR OWN ----ONE STUDENT AT A TIME

Members representing all majors
Sharing Frustrations and Support
Keeping up with campus changes and student opportunities
New Instruction Methodologies/Blended Approach
Migratory Learning
Certificates & Badges to Strengthen Degrees
Decreased Time To Graduation/Decreased Cost for Degree
**Scholarships**

**Audrey Levine**
**College Scholarship Committee**
156 Scholarship funds; award annually to ~500 students; Scholarship Universe

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
<th>Position</th>
</tr>
</thead>
<tbody>
<tr>
<td>Joan Curry</td>
<td>SWES</td>
<td>Associate Professor</td>
</tr>
<tr>
<td>William Schurg</td>
<td>Animal Sciences</td>
<td>Professor</td>
</tr>
<tr>
<td>Allison Ewing</td>
<td>FCS</td>
<td>Coordinator, Undergraduate Progs.</td>
</tr>
<tr>
<td>William Matter</td>
<td>SNRE</td>
<td>Professor</td>
</tr>
<tr>
<td>Robert Torres</td>
<td>Ag. Education</td>
<td>Dept. Head</td>
</tr>
<tr>
<td>Audrey Levine</td>
<td>Academic Programs</td>
<td>Coordinator, Acad. Info/Progs.</td>
</tr>
<tr>
<td>Frank Santiago</td>
<td>Academic Programs</td>
<td>Assistant Director, Recruitment</td>
</tr>
<tr>
<td>Dennis Ray</td>
<td>Plant Sciences</td>
<td>Professor</td>
</tr>
<tr>
<td>Elaine Marchello</td>
<td>Academic Programs</td>
<td>Assistant Dean</td>
</tr>
<tr>
<td>Mitch McClaran</td>
<td>SNRE</td>
<td>Professor</td>
</tr>
<tr>
<td>Kelly Jackson</td>
<td>Nutritional Sciences</td>
<td>Coordinator, Undergraduate Progs.</td>
</tr>
</tbody>
</table>

**Events**

**Cecilia Mazon**
Graduation
Honors Convocation
Outstanding Senior
Freshman & Transfer Student Lunch
Shane’s Bold Vision for our Students

• Every student getting a job… not just a degree
• Connecting our students directly with employers
CALS Careers Center

Mike Staten  Kyle Sharp  Frank Santiago

Companies
- Have access to our best student leaders
- Recruit interns for their business
- Invest as a partner and hire top talent

Students
- Career skills Training
- Engagement with industry representatives
- Networking opportunities
- Internships
- One stop shop for CALS Career information
- Complimentary to UA/Unit Career Services

Academic Units
- Potential for industry partnerships
- Grateful graduates become loyal alumni
- Support for innovative experiential learning
- Improved acceptance rates for students in graduate and professional programs
- Industry feedback about needs
- Increases visibility of CALS/Units students as very employable
CALS Careers Center

Physical Location

 Welcomes Students, Faculty, Staff, Alumni and Industry Partners

Encourages Engagement and Interaction

Funded by Donors
CALS Careers Center

Programs for Students

Ambassadors: College Representatives

Dean’s Leadership 50

DL50 funded by a Grant from CoBank

Competitive Application Unit Nomination

Extensive Training in Career Skills

Opportunity to Meet with High Level Executives

Representatives of CALS & Units at Events
TO BE COMPETITIVE
ALL STUDENTS NEED TRAINING IN THE CAREER SKILLS

WHAT ABOUT THE OTHER ~3100 STUDENTS?

HOW DO YOU GET CAREER SKILLS TRAINING TO ~3100 PEOPLE?
# Curriculum and Assessment Committee

**Elaine Marchello & Dennis Ray**

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
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</thead>
<tbody>
<tr>
<td>Wendy Davis</td>
<td>Animal and Comparative Biomedical Sciences</td>
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<tr>
<td>Dennis Ray</td>
<td>School of Plant Sciences</td>
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<tr>
<td>Goggy Davidowitz</td>
<td>Entomology</td>
</tr>
<tr>
<td>Elaine Marchello</td>
<td>Career &amp; Academic Services</td>
</tr>
<tr>
<td>Bobby Torres</td>
<td>Agricultural Education</td>
</tr>
<tr>
<td>Ryan Foor</td>
<td>Agricultural Education</td>
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<td>Kelly Jackson</td>
<td>Nutritional Sciences</td>
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<tr>
<td>James Hunt</td>
<td>Career &amp; Academic Services</td>
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<tr>
<td>Jennifer Ricketts</td>
<td>Nutritional Sciences</td>
</tr>
<tr>
<td>Kate Johansen</td>
<td>Animal and Comparative Biomedical Sciences</td>
</tr>
<tr>
<td>Mike Riggs</td>
<td>Animal and Comparative Biomedical Sciences</td>
</tr>
<tr>
<td>Mitch McClaran</td>
<td>School of Natural Resources</td>
</tr>
<tr>
<td>Paul Wilson</td>
<td>Agricultural Resource Economics</td>
</tr>
<tr>
<td>Quint Molina</td>
<td>Agricultural Education</td>
</tr>
<tr>
<td>Angela Taylor</td>
<td>Nortona School, Retailing &amp; Consumer Sciences</td>
</tr>
<tr>
<td>Tom Wilson</td>
<td>Soil, Water &amp; Environmental Sciences</td>
</tr>
<tr>
<td>Peter Waller</td>
<td>Agricultural Biosystems Engineering</td>
</tr>
</tbody>
</table>
Our Goal is that all CALS graduates integrate the following Skill Sets

Communication skills
- listen effectively
- communicate accurately and concisely
- communicate professionally in oral, written and multi-media formats
- Communicate effectively in teams

Leadership skills
- see the “big picture” and think strategically
- recognize when to lead and when to follow
- respect and acknowledge contributions from others
- recognize and deal constructively with conflict
- build professional relationships
- understand the interaction of self-management, professionalism and teamwork.

Problem Solving skills
- identify and analyze alternative solutions to problems
- implement effective and appropriate actions
- apply knowledge from one situation to another
- evaluate the impact of decisions.

CALS Graduates

http://cals.arizona.edu/cas/
HOW DO WE GET THESE SKILLS INTO A TIGHT CURRICULUM AT A LOW COST AND NOT INCREASE TIME TO GRADUATION?

USE A COMPETENCY-BASE APPROACH THAT WILL ALLOW UNITS MAXIMUM FLEXIBILITY IN BRINGING THE SKILLS TO THEIR STUDENTS

COMPETENCY COMMITTEE

<table>
<thead>
<tr>
<th>Name</th>
<th>Department/Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mike Staten</td>
<td>Norton School Retailing Consumer Sciences</td>
</tr>
<tr>
<td>Doug Reed</td>
<td>Animal and Comparative Biomedical Sciences</td>
</tr>
<tr>
<td>Ken Feldmann</td>
<td>School of Plant Sciences</td>
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<tr>
<td>Kelly Jackson</td>
<td>Nutritional Sciences</td>
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<tr>
<td>Robert MacArthur</td>
<td>CALS Communications and Technologies</td>
</tr>
<tr>
<td>Elaine Marchello</td>
<td>Career &amp; Academic Services</td>
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<tr>
<td>Stuart Marsh</td>
<td>School of Natural Resources &amp; the Environment</td>
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</table>
Website
CALS Cooperative Extension Update – January 2014

Jeffrey C. Silvertooth
Associate Dean
Director for Extension and Economic Development
2014 Centennial for CE
Land Grant Foundations

• **Morrill Act – 1862**
  – Signed into law by Abraham Lincoln, 2 June 1862
  – Provided for the foundation of land-grant universities in every state of the union.

• **Hatch Act – March 1887**
  – Provided for the formation of the Agricultural Experiment Stations associated with each land-grant institution
Land Grant

• **Smith-Lever Act of 1914**
  – 8 May 1914, signed into law by President Woodrow Wilson
  – Established a system of cooperative extension services associated with each of the land-grant universities.
The **Smith Lever Act of 1914 (8 May)** established the Agricultural Extension Service (now **Cooperative Extension**):

“to disseminate and encourage the application of useful and practical information relating to *agricultural, home economics, and related subjects* among the people of the United States not enrolled in land-grant colleges.”
Land Grant Institution

• A valid model for education and research.
  – Responding to societal needs
  – Bringing science to bear on practical problems.
  – Taking university information and education to the public

• Extension is a critical and fundamental aspect of CALS and UA.
2014 Centennial for CE
University of Arizona

First Classes - 1 October 1891

Old Main, 1889
Cooperative Extension

• A **bridging** organization providing the linkage between the scientific arena to:
  – Communities
  – Industry
  – Policy
  – Etc…. 
CALS Cooperative Extension

• Where are we today?

• Current directions?
## Distribution of CALS Faculty Extension Appointments*

<table>
<thead>
<tr>
<th>Location</th>
<th>Head Count</th>
</tr>
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<tbody>
<tr>
<td>Campus</td>
<td>34</td>
</tr>
<tr>
<td>Counties</td>
<td>48</td>
</tr>
<tr>
<td>Centers</td>
<td>18</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>100</strong></td>
</tr>
</tbody>
</table>

* Head count data, January 2014
• CRIT--1993
• Hualapai--2002
• Hopi--1991
• Navajo-Tuba City--2007
• Navajo-Shiprock--1993
• Navajo-Tri State
  – Window Rock--1991
• San Carlos—1992

• Requested:
• Tohono O’odham (2)
• Gila River and Ak-Chin
• Salt River and Ft. McDowell
• White River
• Navajo (+3)
Cooperative Extension appropriated funds ~ $12.55M

Cooperative Extension expenditures ~ $34-36M

“Leveraging” of allocated funds: ~ 2.7
Cooperative Extension

- Total CE personnel ~ 600 people
  ~ 70% funded on “soft” money

- Cooperative Extension ~ 36-40% of all CALS grants and contracts (FY12-13)
In 2012, we had

- **16,750 VOLUNTEERS** contributing 213,871 hours to programs
- **115,382 YOUTH** enrolled in 4-H Youth Development programs
- **478,829 PARTICIPANTS** in Cooperative Extension programs
Decision Package Proposal

• $3.8M for Cooperative Extension
  – Selected by President Hart in August 2013 as one of the UA initiatives for the FY15 budget.
  – Approved by ABOR
    • full support from all four ABOR presidents
  – Submitted by ABOR to Governor Brewer’s office.
    • Inclusion in the Governor’s FY15 budget???
Guiding Principles – New Funds

Basics:

• Adhere to the strategic plan
• Work with stakeholders
  – Identify areas of critical need
• Deliver strong programs across the state
Guiding Principles – New Funds

• Build new program areas
  – Based on need identified by working with stakeholders in Arizona.
    • Not a “backfill” process for funds lost through budget reductions and the recession

• *Generally* equitable distribution among program areas (ANR, FCHS, 4-H YD)

• Demonstrate delivery of viable programs across Arizona.
Cooperative Extension
Strategic Planning

8 Strategic Goals

5 goals: reinforce programs in 4-H, ANR, and FCHS
Cooperative Extension
Strategic Planning

8 Strategic Goals

3 goals: procedures and methods

– Improve the CE profile
– Improve program integration
– Asymmetric balance/direction of resources
Major Program Areas

Healthy People

Healthy Communities

Healthy Environments
CE Regionalization
Administration & Business Functions

• Proposed in May 2013 and discussed with CE County Directors.

• Constraints and objectives:
  – Duplication of effort in every unit office
  – Severe limitation of staff and personnel resources to address all duties.
  – Need to focus and better utilize expertise and skills among personnel.
  – Need better operational efficiency.
Cooperative Extension Regions
(Administrative - Business)

• **Northern** – Coconino, Mohave, Yavapai

• **Southwest** - Yuma/LaPaz

• **Southeast** – Cochise, Graham, Greenlee
Strategic Hiring Plan – Objectives

• Consider lists of hiring priorities for ALL units

• HODs, CEDs, and CDs developed a rubric for evaluation of position proposals.
  – May 2013.

• The SPHC evaluated and ranked all 27 proposed positions.

• CE Administration is using the SPHC list as a hiring plan guideline.
Strategic Considerations

• System Support Positions Needed:
  – Economic Impact Analysis*
  – External Relations/Marketing*
  – Program Evaluation
  – Volunteers

• Basic staff and infrastructure support

* New program developments are on-going
Four 2014 AZ Centennial Events

• Southwest: 26-27 February in conjunction with the SW Ag Conference in Yuma.

• Southeast: 10 May site TBA

• Northern: late July – early August – TBA

• Central: Phoenix – early October - TBA
CALS Cooperative Extension
Summary - JCS View/Outlook

• Extension is a positive asset to CALS/UA
• Extension goals and characteristics:
  – Mobile
  – Top quality people and programs
  – Flexible
  – Accountable
    • Demonstrate value and productivity
  – Partnership with industry and agencies
  – Fiscally sound and sustainable