



USF Board of Trustees

Friday, August 19, 2022
Microsoft Teams Meeting

A G E N D A

I. Call to Order

Chair Will Weatherford

II. New Business – Action Item

a. FL 101 – [USF FY 2022-23 Operating Budget](#)

Rich Sobieray, Sr. VP/CFO

b. FL 102 – [Ratification of the GAU Collective Bargaining Agreement](#)

Liz Gierbolini, Senior Associate General Counsel

c. FL 103 – Naming Resolution

Gerard Solis, General Counsel

III. Adjournment

Chair Weatherford

Agenda Item: FL 101

USF Board of Trustees
August 19, 2022

Issue: Approval of USF's FY 2022-23 Operating Budget and related materials

Proposed action:

1. Approve the University of South Florida FY 2022-23 Operating Budget and;
2. Authorize the President (or the Designee) to implement budget amendments issued by the state during the fiscal year or other changes approved by the Board Chair.

Executive Summary:

The USF Board of Trustees (BOT) is required to adopt and approve an annual budget for the operation of the University to submit to the Board of Governors.

On June 15, 2022, the BOT approved a FY2022-23 continuation operating budget at last year's level with the understanding that USF would prepare a 2022-23 budget for its approval and subsequent submission to the Board of Governors (BOG) by August 19, 2022. The FY2022-23 Operating Budget (OB) will be presented in summary for receiving such approval from the board.

Financial Impact: See attached.

Strategic Goal(s) Item Supports: Goal 5: A strong, sustainable, and adaptable financial base

BOT Committee Review Date: Finance Committee - August 16, 2022

Supporting Documentation Online (please circle): **Yes** **No**

Prepared by: Business & Finance-Resource Management & Analysis

Fiscal Year 2022-2023

Operating Budget

USF Board of Trustees
August 16, 2022



Objectives

- Impacts on FY23 Operating Budget
- 2022-2023 Operating Budget
- 2022-2023 Educational & General Budget
- 2022-2023 Focus Areas

Proposed Action

1. Approve the University of South Florida fiscal year 2022-23 Operating Budget and;
2. Authorize the President (or the Designee) to implement budget amendments issued by the state during the fiscal year or other changes approved by the Board Chair.

FY23 Operating Budget Calendar for USF

Date	Activity
September 30	E&G Carryforward Spending Plan, Fixed Capital Outlay Budget, and Related Certification due to Board of Governors
September 6	Full Board of Trustees Meeting
August 19	Operating Budget due to Board of Governors
August 19	Board of Trustees Meeting for Budget Approval
August 16	Board of Trustees Finance Committee Meeting
August 4	St. Petersburg Campus Board meeting
July 26	Sarasota-Manatee Campus Board meeting
May through budget submission	Budget preparation and system inputs

Impacts on FY23 Budget



Impacts on FY23 Budget

1. Record Legislative Session – State Appropriations
 - a) Almost \$83M in recurring resources, including \$55M in discretionary
 - b) \$47M in non-recurring resources
 - c) Over \$115M for new facilities construction and maintenance and repair of current facilities
2. USF placed 2nd in State Performance Based rankings ~\$1M
3. Enrollment and Tuition Collections
4. Less Federal Funds support for investment as a result of the pandemic
5. Bargained wage increases, internal equity and state-mandated benefit improvements
6. Cost duplications
7. Economy
 - a) Inflation
 - b) Labor Markets

Net Tuition Collections by Budget Entity

Budget Entity		2018	2019	2020	2021	2022	2023 Projection
Tampa	Distributed Budget	\$ 179,784.8	\$ 179,784.8	\$ 179,784.8	\$ 179,784.8	\$ 179,784.8	
	Collections	\$ 183,006.1	\$ 181,454.1	\$ 180,363.2	\$ 175,709.8	\$ 175,419.8	↔
	Fundable SCH	905,176	902,192	901,669	905,523	871,632	
Health	Distributed Budget	\$ 52,768.4	\$ 52,464.3	\$ 56,732.1	\$ 58,492.8	\$ 60,427.9	
	Collections	\$ 54,808.7	\$ 56,801.5	\$ 58,847.6	\$ 60,780.0	\$ 62,128.1	↑
	Fundable SCH*	124,276	130,812	142,231	156,230	160,344	
St Pete	Distributed Budget	\$ 15,974.8	\$ 16,223.7	\$ 16,070.4	\$ 16,748.5	\$ 16,959.1	
	Collections	\$ 21,040.2	\$ 20,490.0	\$ 19,464.0	\$ 18,623.7	\$ 19,733.8	↑
	Fundable SCH	123,952	120,945	114,315	105,507	105,245	
Sarasota	Distributed Budget	\$ 7,335.8	\$ 7,415.1	\$ 8,787.8	\$ 8,965.3	\$ 8,399.1	
	Collections	\$ 9,469.0	\$ 9,943.4	\$ 10,528.9	\$ 11,642.5	\$ 13,744.8	↑
	Fundable SCH	56,952	59,782	62,832	70,272	73,286	
USF Total	Distributed Budget	\$ 255,863.8	\$ 255,887.9	\$ 261,375.0	\$ 263,991.3	\$ 265,570.8	
	Collections	\$ 268,324.0	\$ 268,688.9	\$ 269,203.7	\$ 266,756.1	\$ 271,026.4	↑
	Fundable SCH	1,210,356	1,213,731	1,221,047	1,237,532	1,210,507	

NOTE: All amounts are in thousands

*Health SCH excludes Professional Programs

2022-2023 Operating Budget



**NOTE: Fiscal year 2023 plan figures are
subject to minor fluctuations between
budget categories prior to the submission to
the Board of Governors**

Funding Sources for University of South Florida

Total Sources (in Thousands)	FY22 Plan	FY22 Actuals	FY23 Plan	Variance FY23 Plan to FY22 Actuals		Variance FY23 Plan to FY22 Plan	
				\$	%	\$	%
Student Tuition	\$ 286,312	\$ 271,681	\$ 290,899	\$ 19,219	7.1%	\$ 4,587	1.6%
State Appropriations	437,235	437,920	524,522	86,602	19.8%	87,287	20.0%
Contracts and Grants	458,936	456,871	364,516	(92,355)	-20.2%	(94,420)	-20.6%
Auxiliaries	235,044	252,607	253,601	994	0.4%	18,557	7.9%
Local Funds	461,770	438,908	461,598	22,691	5.2%	(172)	0.0%
Faculty Practice Plan - DSO	365,825	377,664	367,528	(10,136)	-2.7%	1,703	0.5%
TOTAL Operating Budget Funding Sources	2,245,122	2,235,650	2,262,664	27,015	1.2%	17,542	0.8%
Other State Allocations thru Agencies	-	-	42,500	42,500	100.0%	42,500	100.0%
USF Alumni Association	2,590	2,625	3,164	539	20.5%	574	22.2%
USF Foundation, Inc.	119,355	64,704	128,205	63,501	98.1%	8,850	7.4%
USF Health Professions Conferencing Corp	12,104	15,150	16,784	1,633	10.8%	4,680	38.7%
USF Institute of Applied Engineering, Inc.	12,308	9,665	17,890	8,225	85.1%	5,582	45.3%
USF Research Foundation, Inc.	13,917	13,566	15,033	1,467	10.8%	1,116	8.0%
Sun Dome, Inc.	1,905	2,007	2,156	149	7.4%	251	13.2%
DSO (excl Faculty Practice Plan) Sources	162,179	107,717	183,231	75,515	70.1%	21,053	13.0%
Total Sources	2,407,301	2,343,366	2,488,395	145,029	6.2%	81,094	3.4%

NOTE: Operating Budget Funding Sources exclude Transfers In category from Schedule I because DSO revenues are listed as a source

USF Financing Corp Revenues were not included as it is primarily a flow through entity

FY 2023 Major Differences Explained

Total Sources (in Thousands)	FY22 Plan	FY22 Actuals	FY23 Plan	Variance FY23 Plan to FY22 Actuals		Variance FY23 Plan to FY22 Plan	
				\$	%	\$	%
State Appropriations	437,235	437,920	524,522	86,602	19.8%	87,287	20.0%

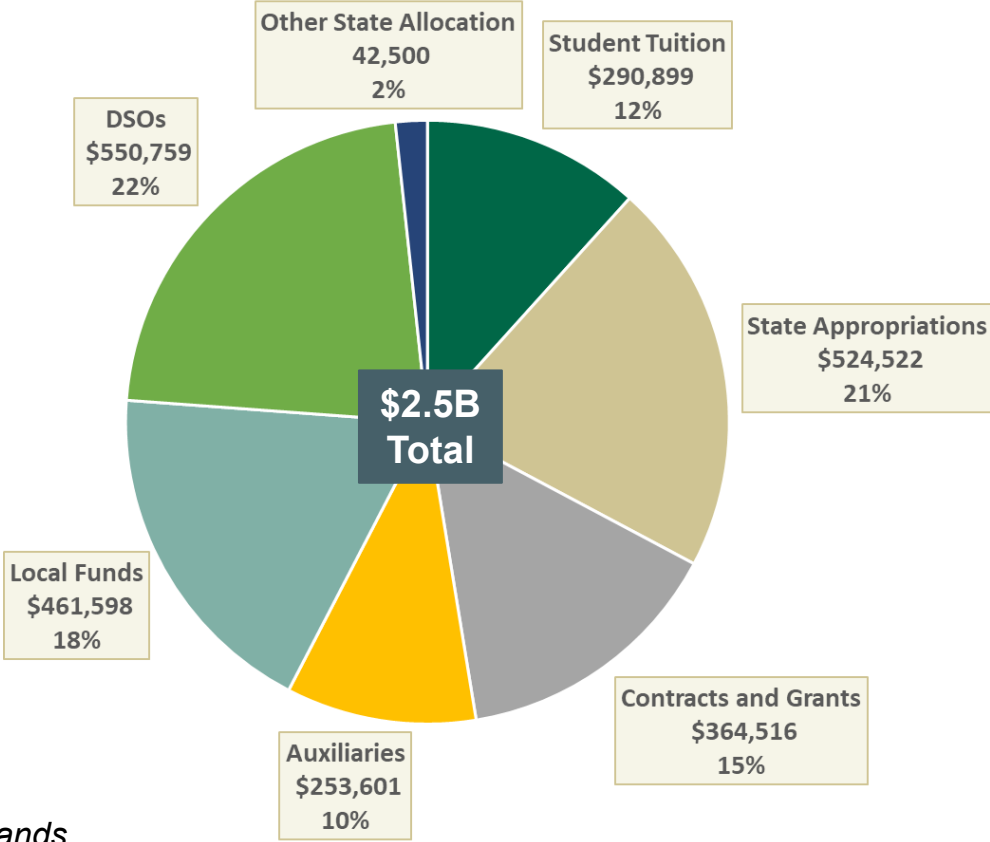
- State Appropriations
 - \$44M – Operational Support
 - \$20.5m – Cyber Allocation
 - \$11.96M – Nursing
 - \$11M – National Rankings

FY 2023 Major Differences Explained

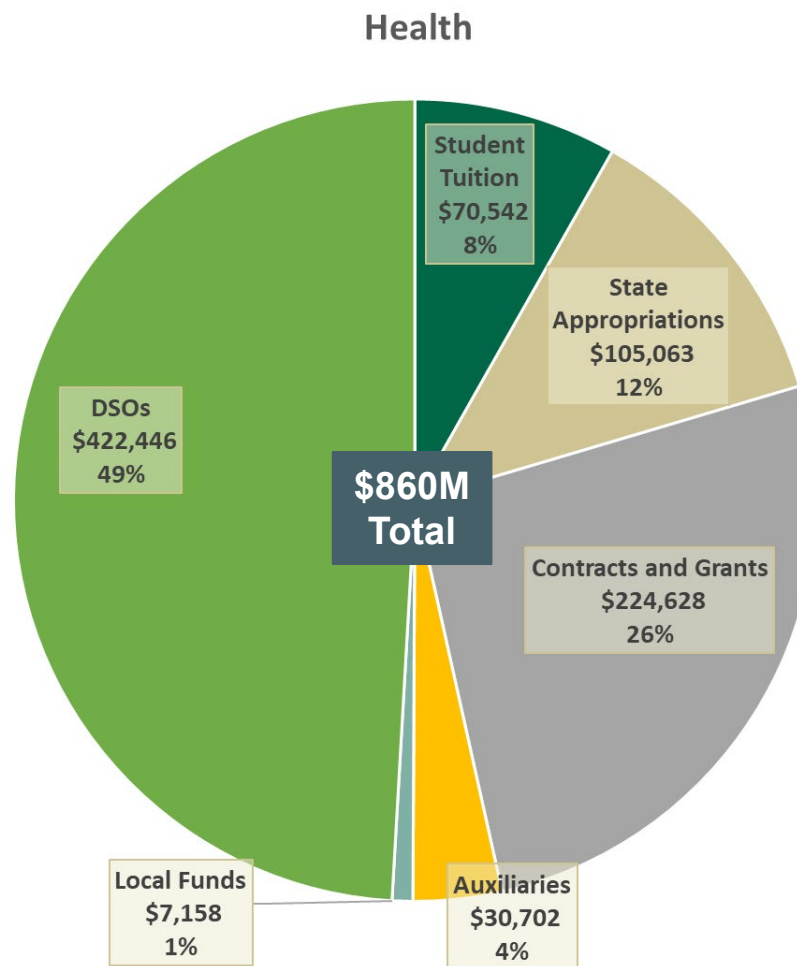
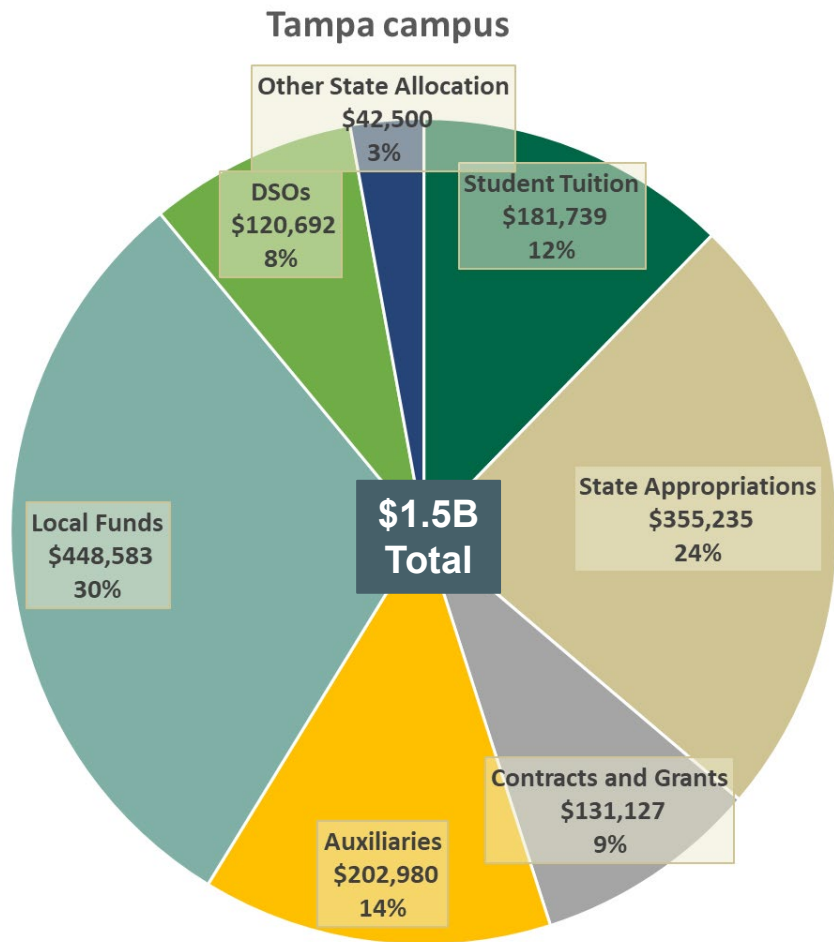
Total Sources (in Thousands)	FY22 Plan	FY22 Actuals	FY23 Plan	Variance FY23 Plan to FY22 Actuals		Variance FY23 Plan to FY22 Plan	
				\$	%	\$	%
Federal Funds	117,221	111,103	6,590	(104,514)	-94.1%	(110,632)	-1678.8%
All Other Contracts and Grants	341,715	345,767	357,926	12,159	3.5%	16,211	4.5%
Contracts and Grants	458,936	456,871	364,516	(92,355)	-20.2%	(94,420)	-20.6%

- Contracts & Grants
 - Remaining COVID-19 Institutional Federal Funds are \$6.1M and 467K new allocation for St. Petersburg and Sarasota-Manatee campuses

Funding Sources for University of South Florida

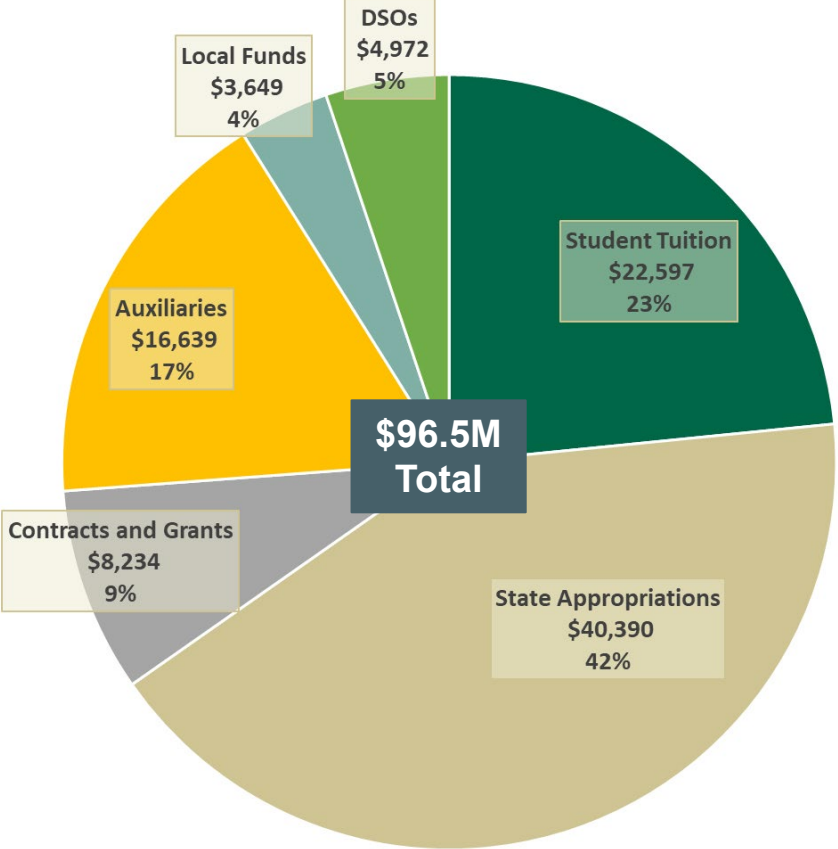


NOTE: All amounts in thousands

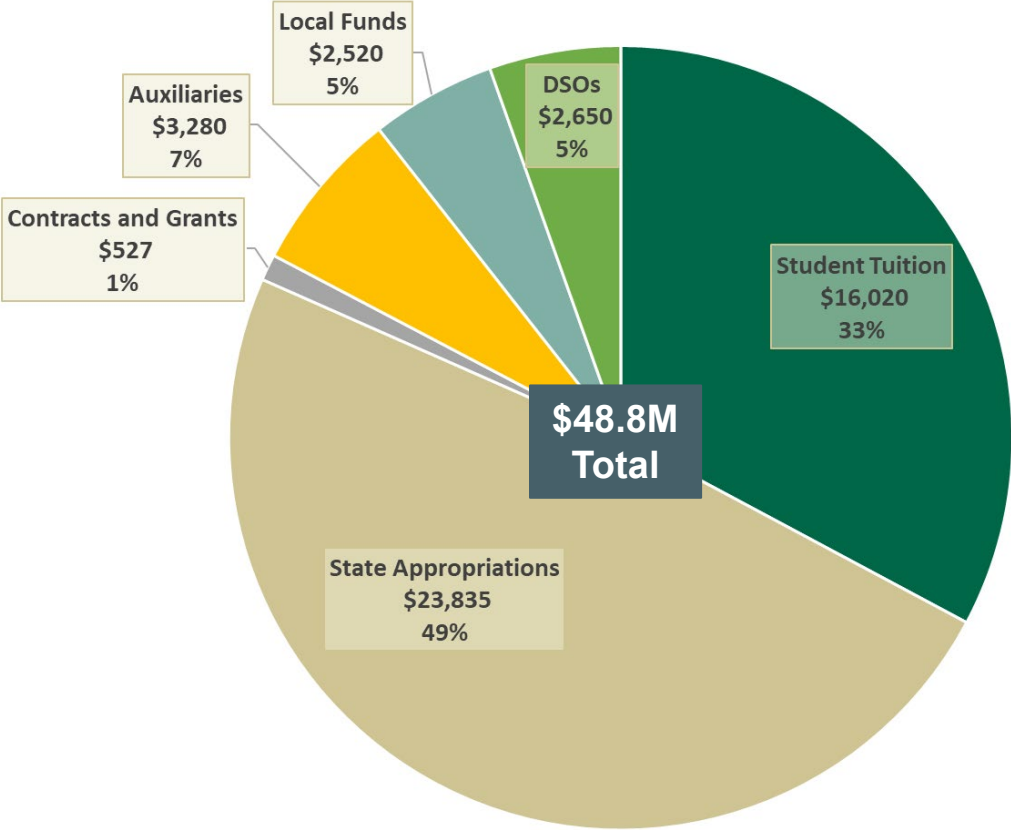


NOTE: All amounts in thousands

St. Petersburg campus



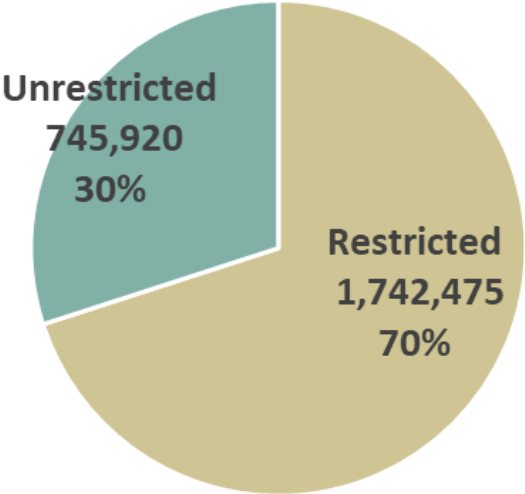
Sarasota-Manatee campus



NOTE: All amounts in thousands

Operating Budget Sources - University of South Florida

FY23 Plan	
Restricted:	
Student Tuition - Need Based Differential/Tuition	14,495
State Appropriations - Specific Appropriations	55,007
Contracts and Grants	364,516
Auxiliaries	253,601
Local Funds	461,598
DSOs	550,759
Other State Allocations thru Agencies	42,500
Restricted	1,742,475
Unrestricted:	
Student Tuition	276,405
State Appropriations	469,515
Unrestricted	745,920
TOTAL Sources	2,488,395



NOTE: All amounts in thousands

Operating Budget Expenses – University of South Florida

Budgeted Expenses (in Thousands)	FY22 Plan	FY22 Actuals	FY23 Plan	Variance FY23 Plan		Variance FY23 Plan	
				\$	%	\$	%
Salaries and Benefits	\$ 1,065,730	\$ 1,029,396	\$ 1,103,754	\$ 74,359	7.2%	\$ 38,024	3.6%
Other Personal Services	138,303	139,252	134,293	(4,959)	-3.6%	(4,009)	-2.9%
Expenses	1,061,152	859,756	1,066,880	207,123	24.1%	5,728	0.5%
Operating Capital Outlay	7,552	7,437	7,658	221	3.0%	106	1.4%
Risk Management	6,712	7,316	6,176	(1,140)	-15.6%	(536)	-8.0%
Financial Aid	14,000	14,441	14,183	(258)	-1.8%	183	1.3%
Debt Service	3,004	3,096	3,335	239	7.7%	332	11.1%
Library Resources	8,606	10,383	9,179	(1,205)	-11.6%	572	6.6%
TOTAL Operating Budget Expenses	2,305,059	2,071,078	2,345,457	274,380	13.2%	40,399	1.8%
Cybersecurity Threat Assessment			7,000	7,000	100.0%	7,000	100.0%
Cybersecurity Training for State & Local Govt Employees			30,000	30,000	100.0%	30,000	100.0%
FL Flood Hub Operating Expenses			5,500	5,500	100.0%	5,500	100.0%
Other State Allocations thru Agencies			42,500	42,500	100.0%	42,500	100.0%
TOTAL University Expenses	2,305,059	2,071,078	2,387,957	316,880	15.3%	82,899	3.6%

2022-2023 Education & General Budget



State Funding for USF after the Legislative Session

- The campuses, including Health continue to work on the allocation of the new discretionary resources.
- These allocations will align with our strategic plan, performance-based funding and our national rankings.
- The focus of distributions for FY23 include:
 - Non-discretionary investments
 - Prior-year deficit - partial
 - Bargained base salary increases and minimum wage, including internal equity issues
 - Basic support unit infrastructure
 - Investment in Colleges

2022-2023 Focus Areas



New Resource Scorecard

The University target is \$XXX million over the next 5 years of new resources.

5-Year Goal	\$XXXM		
Major Projects	Upfront Total	Annual Funding	Status
State Funding	\$0		
Tuition and Fees	\$0		
Contracts & Grants, including F&A			
Philanthropy			
Sponsorship Agreements			
Concession Agreements			
Total			

The purposes of these funding sources are investments in:

1. Students and Faculty
2. Administrative Overhead
3. Capital Infrastructure
4. Athletics

Operational Efficiency Scorecard

The University target is \$XX million over the next 5 years.

Opportunities include:

1. Elimination of duplication across shared services environment
2. Strategic Procurement
3. Instructional Capacity
4. Re-envisioning Academic Portfolio
5. Financial Aid Optimization
6. Capital Projects

5-Year Goal	\$XXM		
Progress to Date	Total	% of Goal	Status
Through FY23			
Through FY24			
Through FY25			
Through FY26			
Through FY27			

Questions

Proposed Action

1. Approve the University of South Florida fiscal year 2022-23 Operating Budget and;
2. Authorize the President (or the Designee) to implement budget amendments issued by the state during the fiscal year or other changes approved by the Board Chair.

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Local Funds ⁴					Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
					Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance			
1 Beginning Fund Balance :	\$ 294,470,270	\$ 140,233,300	\$ 232,548,134	\$ 13,854,622	\$ 9,193,850	\$ 1,900,791	\$ 1,194,833	\$ 18,429,387	\$ -	\$ 5,195,227	\$ 83,259,212	\$ 800,279,626
2												
3 Receipts/Revenues												
4 General Revenue	\$ 425,117,617	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 425,117,617
5 Lottery	\$ 98,166,791	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 98,166,791
6 Student Tuition	\$ 290,899,212	\$ -	\$ 3,777,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 294,676,643
7 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9 Other U.S. Grants	\$ -	\$ 401,182,830	\$ -	\$ -	\$ 285,950,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 687,132,830
10 City or County Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11 State Grants	\$ -	\$ 500,000	\$ -	\$ -	\$ 91,586,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,086,800
12 Other Grants and Donations	\$ -	\$ -	\$ 58,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 58,750
13 Donations / Contrib. Given to the State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14 Sales of Goods / Services	\$ -	\$ 874,568	\$ 91,005,602	\$ -	\$ -	\$ 450,000	\$ 7,121,500	\$ -	\$ -	\$ -	\$ -	\$ 99,451,670
15 Sales of Data Processing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16 Fees	\$ -	\$ -	\$ 71,154,240	\$ 18,701,739	\$ 12,340,000	\$ -	\$ 16,800,000	\$ 10,184,395	\$ 4,812,234	\$ 1,263,360	\$ 191,074,091	\$ 326,330,059
17 Miscellaneous Receipts	\$ -	\$ 850,000	\$ 49,195,558	\$ -	\$ 75,000	\$ 168,503	\$ 11,531,000	\$ -	\$ -	\$ -	\$ 176,453,748	\$ 238,273,809
18 Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19 Concessions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
20 Assessments / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
21 Other Receipts / Revenues ⁶	\$ 1,237,943	\$ 3,608,200	\$ 38,412,082	\$ 471,297	\$ 8,500	\$ 11,300	\$ 3,000	\$ 57,605	\$ -	\$ 62,205	\$ -	\$ 43,872,132
22 Subtotal:	\$ 815,421,563	\$ 407,015,598	\$ 253,603,663	\$ 19,173,036	\$ 389,960,300	\$ 629,803	\$ 35,455,500	\$ 10,242,000	\$ 4,812,234	\$ 1,325,565	\$ 367,527,839	\$ 2,305,167,101
23 Transfers In	\$ -	\$ 180,061,746	\$ 48,585,122	\$ 11,400,629	\$ 22,950,101	\$ 115,928	\$ 23,244,500	\$ -	\$ -	\$ 145,431	\$ -	\$ 286,503,457
24 Total - Receipts / Revenues:	\$ 815,421,563	\$ 587,077,344	\$ 302,188,785	\$ 30,573,665	\$ 412,910,401	\$ 745,731	\$ 58,700,000	\$ 10,242,000	\$ 4,812,234	\$ 1,470,996	\$ 367,527,839	\$ 2,591,670,558
25												
26 Operating Expenditures												
27 Salaries and Benefits	\$ 548,169,119	\$ 201,985,173	\$ 84,963,877	\$ 7,097,159	\$ 731,370	\$ 150,000	\$ 19,139,075	\$ 384,344	\$ 648,800	\$ -	\$ 223,316,294	\$ 1,086,585,211
28 Other Personal Services	\$ 43,397,506	\$ 70,904,900	\$ 14,478,428	\$ 4,680,741	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ 393	\$ 947,164	\$ 134,424,132
29 Expenses	\$ 195,465,074	\$ 210,470,132	\$ 130,631,825	\$ 14,059,708	\$ 397,656,737	\$ 475,014	\$ 34,578,923	\$ 24,137,234	\$ 4,163,434	\$ 1,515,254	\$ 65,219,596	\$ 1,078,372,931
30 Operating Capital Outlay	\$ 735,620	\$ 3,656,100	\$ 2,977,847	\$ 242,918	\$ -	\$ -	\$ -	\$ 11,000	\$ -	\$ 34,093	\$ -	\$ 7,657,578
31 Risk Management	\$ 3,565,021	\$ 543,000	\$ 1,547,431	\$ 44,286	\$ -	\$ -	\$ 476,000	\$ -	\$ -	\$ -	\$ -	\$ 6,175,738
32 Financial Aid	\$ 14,183,002	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 14,183,002
33 Scholarships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
34 Waivers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
35 Finance Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
36 Debt Service	\$ -	\$ -	\$ 3,335,352	\$ 100	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,335,452
37 Salary Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
38 Law Enforcement Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
39 Library Resources	\$ 8,668,277	\$ -	\$ 510,428	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 9,178,705
40 Institute of Government	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
41 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
42 Black Male Explorers Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
43 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
44 Other Operating Category (Provide Details)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
45 Total Operating Expenditures :	\$ 814,183,619	\$ 487,559,305	\$ 238,445,188	\$ 26,124,912	\$ 398,403,107	\$ 625,014	\$ 54,193,998	\$ 24,532,578	\$ 4,812,234	\$ 1,549,740	\$ 289,483,054	\$ 2,339,912,749
46												

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	-----Local Funds ⁴ -----											Summary Totals
	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance	Board - Approved Fees	Faculty Practice Plan ⁵	
47 Non-Operating Expenditures (*Amounts provided as provisional estimates pending final approval and certification of Carryforward Spending Plan and Fixed Capital Outlay Budget at a later date)												
48 * Carryforward (From Prior Period Funds)	\$ 169,785,539	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 169,785,539
49 * Fixed Capital Outlay	\$ -	\$ 8,541,240	\$ 10,936,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 19,477,740
50 Transfers Out ⁶	\$ -	\$ 101,941,361	\$ 59,807,086	\$ 11,915,589	\$ 14,443,500	\$ 141,026	\$ 4,506,000	\$ -	\$ -	\$ -	\$ 78,892,946	\$ 271,647,508
51 Other ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52 Total Non-Operating Expenditures :	\$ 169,785,539	\$ 110,482,601	\$ 70,743,586	\$ 11,915,589	\$ 14,443,500	\$ 141,026	\$ 4,506,000	\$ -	\$ -	\$ -	\$ 78,892,946	\$ 460,910,787
53												
54 Ending Fund Balance :	\$ 125,922,675	\$ 129,268,738	\$ 225,548,145	\$ 6,387,786	\$ 9,257,644	\$ 1,880,482	\$ 1,194,835	\$ 4,138,809	\$ 0	\$ 5,116,483	\$ 82,411,051	\$ 591,126,648
55												
56 Fund Balance Increase / Decrease :	\$ (168,547,595)	\$ (10,964,562)	\$ (6,999,989)	\$ (7,466,836)	\$ 63,794	\$ (20,309)	\$ 2	\$ (14,290,578)	\$ 0	\$ (78,744)	\$ (848,161)	\$ (209,152,978)
57 Fund Balance Percentage Change :	-57.24%	-7.82%	-3.01%	-53.89%	0.69%	-1.07%	0.00%	-77.54%		-1.52%	-1.02%	-26.13%

1. The Education and General budget funds the general instruction, research, and public service operations of the universities. Universities have accumulated ending fund balances for activities such as the implementation and maintenance of Enterprise Resource Program systems, contingency for unfunded enrollment growth, potential budget reductions, anticipated increases in utilities, and prior year encumbrances (recorded, estimated liability at year-end for ordered or received goods or services), and compliance with Section 1011.45 F.S. on maintaining a 7% reserve.
2. The Contracts and Grants budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of Federal contracts or grants.
3. Auxiliaries are ancillary support units on each university campus. Some of the major activities include housing, food services, book stores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserve, repair and replacement reserves for future maintenance costs, construction/renovation of auxiliary facilities, and prior year encumbrances.
4. Local funds include the following university activities:
 - a. Student Activities - Supported primarily by the student activity and service fee and funds operations of the student government, cultural events, organizations, and intramural/club sports.
 - b. Financial Aid - This activity represents the financial aid amounts for which the university is fiscally responsible. Examples include: student financial aid fee, bright futures, federal grants, college work study, and scholarships. The ending fund balance represents a timing difference between the receipts of funds and disbursement to the students.
 - c. Concessions - These resources are generated from various vending machines located on the university campuses.
 - d. Athletics - Revenues are primarily derived from the student athletic fee, ticket sales, and sales of goods. Sufficient fund balances are maintained to provide the necessary support for ongoing athletic activities.
 - e. Technology fee - Collections are used to enhance instructional technology resources for students and faculty.
 - f. Self-Insurance Program - These programs are directed by the respective self-insurance councils and the captive insurance companies (These companies underwrite the risks of its owner and the owner's affiliates.). These activities are supported by premiums charged to the insured individuals and entities (primarily medical faculty and institutions).
 - g. Board-Approved Fees - Student fees proposed by each university and authorized by the Board of Governors to address specific student-based needs not addressed through another service or fee.
5. Faculty Practice - The Faculty Practice Plan collects and distributes income from faculty billings for patient services provided in conjunction with state university medical school programs.
6. Other Receipts/Revenues includes categories such as interest, penalties, refunds, admissions, fines, taxes, etc.
7. Other Non-Operating Expenditures includes categories such as refunds, payment of sales taxes, or indirect costs.

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - TAMPA
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Local Funds ⁴					Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
					Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance			
1 Beginning Fund Balance :	\$ 177,343,749	\$ 138,813,572	\$ 202,833,021	\$ 6,382,512	\$ 9,179,991	\$ 1,843,939	\$ 1,194,833	\$ 17,543,099	\$ -	\$ 4,737,010	\$ -	\$ 559,871,726
2												
3 Receipts/Revenues												
4 General Revenue	\$ 255,083,406	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 255,083,406
5 Lottery	\$ 78,914,561	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 78,914,561
6 Student Tuition	\$ 181,739,487	\$ -	\$ 3,777,431	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 185,516,918
7 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9 Other U.S. Grants	\$ -	\$ 392,422,206	\$ -	\$ -	\$ 285,950,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 678,372,206
10 City or County Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11 State Grants	\$ -	\$ 500,000	\$ -	\$ -	\$ 91,585,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,085,000
12 Other Grants and Donations	\$ -	\$ -	\$ 58,750	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 58,750
13 Donations / Contrib. Given to the State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14 Sales of Goods / Services	\$ -	\$ 874,568	\$ 86,618,634	\$ -	\$ -	\$ 450,000	\$ 7,121,500	\$ -	\$ -	\$ -	\$ -	\$ 95,064,702
15 Sales of Data Processing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16 Fees	\$ -	\$ -	\$ 66,037,936	\$ 13,995,114	\$ 12,340,000	\$ -	\$ 16,800,000	\$ 9,099,482	\$ -	\$ 1,082,675	\$ -	\$ 119,355,207
17 Miscellaneous Receipts	\$ -	\$ 850,000	\$ 40,175,570	\$ -	\$ 75,000	\$ 168,503	\$ 11,531,000	\$ -	\$ -	\$ -	\$ -	\$ 52,800,073
18 Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19 Concessions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
20 Assessments / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
21 Other Receipts / Revenues ⁶	\$ 737,001	\$ 3,608,100	\$ 37,013,460	\$ 284,000	\$ 8,500	\$ 11,300	\$ 3,000	\$ 52,005	\$ -	\$ 60,100	\$ -	\$ 41,777,466
22 Subtotal:	\$ 516,474,455	\$ 398,254,874	\$ 233,681,781	\$ 14,279,114	\$ 389,958,500	\$ 629,803	\$ 35,455,500	\$ 9,151,487	\$ -	\$ 1,142,775	\$ -	\$ 1,599,028,289
23 Transfers In	\$ -	\$ 177,764,846	\$ 47,677,822	\$ 11,400,629	\$ 22,950,101	\$ 112,928	\$ 23,244,500	\$ -	\$ -	\$ 145,431	\$ -	\$ 283,296,257
24 Total - Receipts / Revenues:	\$ 516,474,455	\$ 576,019,720	\$ 281,359,603	\$ 25,679,743	\$ 412,908,601	\$ 742,731	\$ 58,700,000	\$ 9,151,487	\$ -	\$ 1,288,206	\$ -	\$ 1,882,324,546
25												
26 Operating Expenditures												
27 Salaries and Benefits	\$ 358,504,046	\$ 198,299,173	\$ 81,168,076	\$ 5,872,725	\$ 731,370	\$ 150,000	\$ 19,139,075	\$ 384,344	\$ -	\$ -	\$ -	\$ 664,248,809
28 Other Personal Services	\$ 34,755,997	\$ 70,241,000	\$ 13,903,752	\$ 3,707,120	\$ 15,000	\$ -	\$ -	\$ -	\$ -	\$ 393	\$ -	\$ 122,623,262
29 Expenses	\$ 101,616,003	\$ 203,594,157	\$ 120,894,229	\$ 8,028,816	\$ 397,654,937	\$ 430,014	\$ 34,578,923	\$ 22,635,493	\$ -	\$ 1,156,957	\$ -	\$ 890,589,529
30 Operating Capital Outlay	\$ 460,420	\$ 3,650,000	\$ 2,415,527	\$ 242,918	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 6,768,865
31 Risk Management	\$ 2,566,142	\$ 543,000	\$ 1,518,774	\$ 35,286	\$ -	\$ -	\$ 476,000	\$ -	\$ -	\$ -	\$ -	\$ 5,139,202
32 Financial Aid	\$ 11,248,505	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 11,248,505
33 Scholarships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
34 Waivers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
35 Finance Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
36 Debt Service	\$ -	\$ -	\$ 3,261,110	\$ 100	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,261,210
37 Salary Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
38 Law Enforcement Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
39 Library Resources	\$ 6,586,341	\$ -	\$ 510,228	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 7,096,569
40 Institute of Government	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
41 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
42 Black Male Explorers Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
43 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
44 Other Operating Category (Provide Details)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
45 Total Operating Expenditures :	\$ 515,737,454	\$ 476,327,330	\$ 223,671,696	\$ 17,886,965	\$ 398,401,307	\$ 580,014	\$ 54,193,998	\$ 23,019,837	\$ -	\$ 1,157,350	\$ -	\$ 1,710,975,951
46												

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - TAMPA
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	-----Local Funds ⁴ -----											Summary Totals
	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance	Board - Approved Fees	Faculty Practice Plan ⁵	
47 Non-Operating Expenditures (*Amounts provided as provisional estimates pending final approval and certification of Carryforward Spending Plan and Fixed Capital Outlay Budget at a later date)												
48 * Carryforward (From Prior Period Funds)	\$ 90,588,036	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 90,588,036
49 * Fixed Capital Outlay	\$ -	\$ 8,541,240	\$ 10,436,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,977,740
50 Transfers Out ⁶	\$ -	\$ 101,930,361	\$ 54,345,435	\$ 11,381,636	\$ 14,443,500	\$ 141,026	\$ 4,506,000	\$ -	\$ -	\$ -	\$ -	\$ 186,747,958
51 Other ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52 Total Non-Operating Expenditures :	\$ 90,588,036	\$ 110,471,601	\$ 64,781,935	\$ 11,381,636	\$ 14,443,500	\$ 141,026	\$ 4,506,000	\$ -	\$ -	\$ -	\$ -	\$ 296,313,734
53												
54 Ending Fund Balance :	\$ 87,492,714	\$ 128,034,361	\$ 195,738,993	\$ 2,793,654	\$ 9,243,785	\$ 1,865,630	\$ 1,194,835	\$ 3,674,749	\$ -	\$ 4,867,866	\$ -	\$ 434,906,587
55												
56 Fund Balance Increase / Decrease :	\$ (89,851,035)	\$ (10,779,211)	\$ (7,094,028)	\$ (3,588,858)	\$ 63,794	\$ 21,691	\$ 2	\$ (13,868,350)	\$ -	\$ 130,856	\$ -	\$ (124,965,139)
57 Fund Balance Percentage Change :	-50.66%	-7.77%	-3.50%	-56.23%	0.69%	1.18%	0.00%	-79.05%		2.76%		-22.32%

1. The Education and General budget funds the general instruction, research, and public service operations of the universities. Universities have accumulated ending fund balances for activities such as the implementation and maintenance of Enterprise Resource Program systems, contingency for unfunded enrollment growth, potential budget reductions, anticipated increases in utilities, and prior year encumbrances (recorded, estimated liability at year-end for ordered or received goods or services), and compliance with Section 1011.45 F.S. on maintaining a 7% reserve.
2. The Contracts and Grants budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of Federal contracts or grants.
3. Auxiliaries are ancillary support units on each university campus. Some of the major activities include housing, food services, book stores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserve, repair and replacement reserves for future maintenance costs, construction/renovation of auxiliary facilities, and prior year encumbrances.
4. Local funds include the following university activities:
a. Student Activities - Supported primarily by the student activity and service fee and funds operations of the student government, cultural events, organizations, and intramural/club sports.
b. Financial Aid - This activity represents the financial aid amounts for which the university is fiscally responsible. Examples include: student financial aid fee, bright futures, federal grants, college work study, and scholarships. The ending fund balance represents a timing difference between the receipts of funds and disbursement to the students.
c. Concessions - These resources are generated from various vending machines located on the university campuses.
d. Athletics - Revenues are primarily derived from the student athletic fee, ticket sales, and sales of goods. Sufficient fund balances are maintained to provide the necessary support for ongoing athletic activities.
e. Technology fee - Collections are used to enhance instructional technology resources for students and faculty.
f. Self-Insurance Program - These programs are directed by the respective self-insurance councils and the captive insurance companies (These companies underwrite the risks of its owner and the owner's affiliates.). These activities are supported by premiums charged to the insured individuals and entities (primarily medical faculty and institutions).
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5. Faculty Practice - The Faculty Practice Plan collects and distributes income from faculty billings for patient services provided in conjunction with state university medical school programs.
6. Other Receipts/Revenues includes categories such as interest, penalties, refunds, admissions, fines, taxes, etc.
7. Other Non-Operating Expenditures includes categories such as refunds, payment of sales taxes, or indirect costs.

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - FLORIDA CENTER FOR CYBER SECURITY
 STATE UNIVERSITY SYSTEM OF FLORIDA
 2022-2023 OPERATING BUDGET
 SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Local Funds ⁴					Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
					Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance			
1 Beginning Fund Balance :	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
2												
3 Receipts/Revenues												
4 General Revenue	\$ 20,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,500,000
5 Lottery	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
6 Student Tuition	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
7 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9 Other U.S. Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10 City or County Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11 State Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12 Other Grants and Donations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13 Donations / Contrib. Given to the State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14 Sales of Goods / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15 Sales of Data Processing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16 Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
17 Miscellaneous Receipts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
18 Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19 Concessions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
20 Assessments / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
21 Other Receipts / Revenues ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
22 Subtotal:	\$ 20,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,500,000
23 Transfers In	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
24 Total - Receipts / Revenues:	\$ 20,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,500,000
25												
26 Operating Expenditures												
27 Salaries and Benefits	\$ 1,340,146	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,340,146
28 Other Personal Services	\$ 300,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 300,000
29 Expenses	\$ 18,859,854	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 18,859,854
30 Operating Capital Outlay	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
31 Risk Management	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
32 Financial Aid	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
33 Scholarships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
34 Waivers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
35 Finance Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
36 Debt Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
37 Salary Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
38 Law Enforcement Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
39 Library Resources	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
40 Institute of Government	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
41 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
42 Black Male Explorers Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
43 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
44 Other Operating Category (Provide Details)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
45 Total Operating Expenditures :	\$ 20,500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,500,000
46												

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - FLORIDA CENTER FOR CYBER SECURITY
 STATE UNIVERSITY SYSTEM OF FLORIDA
 2022-2023 OPERATING BUDGET
 SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Local Funds ⁴							Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
				Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance				
47 Non-Operating Expenditures (*Amounts provided as provisional estimates pending final approval and certification of Carryforward Spending Plan and Fixed Capital Outlay Budget at a later date)													
48 * Carryforward (From Prior Period Funds)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
49 * Fixed Capital Outlay	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
50 Transfers Out ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
51 Other ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52 Total Non-Operating Expenditures :	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
53													
54 Ending Fund Balance :	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
55													
56 Fund Balance Increase/ Decrease :	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
57 Fund Balance Percentage Change :													

1. The Education and General budget funds the general instruction, research, and public service operations of the universities. Universities have accumulated ending fund balances for activities such as the implementation and maintenance of Enterprise Resource Program systems, contingency for unfunded enrollment growth, potential budget reductions, anticipated increases in utilities, and prior year encumbrances (recorded, estimated liability at year-end for ordered or received goods or services), and compliance with Section 1011.45 F.S. on maintaining a 7% reserve.
2. The Contracts and Grants budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of Federal contracts or grants.
3. Auxiliaries are ancillary support units on each university campus. Some of the major activities include housing, food services, book stores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserve, repair and replacement reserves for future maintenance costs, construction/renovation of auxiliary facilities, and prior year encumbrances.
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6. Other Receipts/Revenues includes categories such as interest, penalties, refunds, admissions, fines, taxes, etc.
7. Other Non-Operating Expenditures includes categories such as refunds, payment of sales taxes, or indirect costs.

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - HEALTH
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Local Funds ⁴							Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
				Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance				
1 Beginning Fund Balance :	\$ 69,920,726	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 83,259,212	\$ 153,179,938
2													
3 Receipts/Revenues													
4 General Revenue	\$ 92,027,618	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 92,027,618
5 Lottery	\$ 12,740,542	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 12,740,542
6 Student Tuition	\$ 70,542,305	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 70,542,305
7 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9 Other U.S. Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
10 City or County Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11 State Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12 Other Grants and Donations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13 Donations / Contrib. Given to the State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14 Sales of Goods / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
15 Sales of Data Processing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16 Fees	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4,812,234	\$ -	\$ 191,074,091	\$ 195,886,325
17 Miscellaneous Receipts	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 176,453,748	\$ 176,453,748
18 Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19 Concessions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
20 Assessments / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
21 Other Receipts / Revenues ⁶	\$ 295,167	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 295,167
22 Subtotal:	\$ 175,605,632	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4,812,234	\$ -	\$ 367,527,839	\$ 547,945,705
23 Transfers In	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
24 Total - Receipts / Revenues:	\$ 175,605,632	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4,812,234	\$ -	\$ 367,527,839	\$ 547,945,705
25													
26 Operating Expenditures													
27 Salaries and Benefits	\$ 117,980,619	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	648,800	\$ -	\$ 223,316,294	\$ 341,945,713
28 Other Personal Services	\$ 3,482,608	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 947,164	\$ 4,429,772
29 Expenses	\$ 50,434,759	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4,163,434	\$ -	\$ 65,219,596	\$ 119,817,789
30 Operating Capital Outlay	\$ 242,664	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 242,664
31 Risk Management	\$ 912,879	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 912,879
32 Financial Aid	\$ 1,000,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,000,000
33 Scholarships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
34 Waivers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
35 Finance Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
36 Debt Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
37 Salary Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
38 Law Enforcement Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
39 Library Resources	\$ 1,256,936	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,256,936
40 Institute of Government	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
41 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
42 Black Male Explorers Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
43 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
44 Other Operating Category (Provide Details)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
45 Total Operating Expenditures :	\$ 175,310,465	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	4,812,234	\$ -	\$ 289,483,054	\$ 469,605,753
46													

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - HEALTH
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	-----Local Funds ⁴ -----											Summary Totals
	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance	Board - Approved Fees	Faculty Practice Plan ⁵	
47 Non-Operating Expenditures (*Amounts provided as provisional estimates pending final approval and certification of Carryforward Spending Plan and Fixed Capital Outlay Budget at a later date)												
48 * Carryforward (From Prior Period Funds)	\$ 36,696,609	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 36,696,609
49 * Fixed Capital Outlay	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
50 Transfers Out ⁶	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 78,892,946	\$ 78,892,946
51 Other ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52 Total Non-Operating Expenditures :	\$ 36,696,609	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 78,892,946	\$ 115,589,555
53												
54 Ending Fund Balance :	\$ 33,519,285	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ 82,411,051	\$ 115,930,336
55												
56 Fund Balance Increase / Decrease :	\$ (36,401,441)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 0	\$ -	\$ (848,161)	\$ (37,249,602)
57 Fund Balance Percentage Change :	-52.06%										-1.02%	-24.32%

1. The Education and General budget funds the general instruction, research, and public service operations of the universities. Universities have accumulated ending fund balances for activities such as the implementation and maintenance of Enterprise Resource Program systems, contingency for unfunded enrollment growth, potential budget reductions, anticipated increases in utilities, and prior year encumbrances (recorded, estimated liability at year-end for ordered or received goods or services), and compliance with Section 1011.45 F.S. on maintaining a 7% reserve.
2. The Contracts and Grants budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of Federal contracts or grants.
3. Auxiliaries are ancillary support units on each university campus. Some of the major activities include housing, food services, book stores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserve, repair and replacement reserves for future maintenance costs, construction/renovation of auxiliary facilities, and prior year encumbrances.
4. Local funds include the following university activities:
 - a. Student Activities - Supported primarily by the student activity and service fee and funds operations of the student government, cultural events, organizations, and intramural/club sports.
 - b. Financial Aid - This activity represents the financial aid amounts for which the university is fiscally responsible. Examples include: student financial aid fee, bright futures, federal grants, college work study, and scholarships. The ending fund balance represents a timing difference between the receipts of funds and disbursement to the students.
 - c. Concessions - These resources are generated from various vending machines located on the university campuses.
 - d. Athletics - Revenues are primarily derived from the student athletic fee, ticket sales, and sales of goods. Sufficient fund balances are maintained to provide the necessary support for ongoing athletic activities.
 - e. Technology fee - Collections are used to enhance instructional technology resources for students and faculty.
 - f. Self-Insurance Program - These programs are directed by the respective self-insurance councils and the captive insurance companies (These companies underwrite the risks of its owner and the owner's affiliates.). These activities are supported by premiums charged to the insured individuals and entities (primarily medical faculty and institutions).
 - g. Board-Approved Fees - Student fees proposed by each university and authorized by the Board of Governors to address specific student-based needs not addressed through another service or fee.
5. Faculty Practice - The Faculty Practice Plan collects and distributes income from faculty billings for patient services provided in conjunction with state university medical school programs.
6. Other Receipts/Revenues includes categories such as interest, penalties, refunds, admissions, fines, taxes, etc.
7. Other Non-Operating Expenditures includes categories such as refunds, payment of sales taxes, or indirect costs.

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - ST. PETERSBURG
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Local Funds ⁴							Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
				Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance				
1 Beginning Fund Balance :	\$ 25,106,108	\$ 1,215,337	\$ 19,630,208	\$ 2,080,986	\$ 13,859	\$ 46,573	\$ -	\$ 365,594	\$ -	\$ 388,525	\$ -	\$ 48,847,191	
2													
3 Receipts/Revenues													
4 General Revenue	\$ 36,792,357	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 36,792,357	
5 Lottery	\$ 3,495,657	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,495,657	
6 Student Tuition	\$ 22,596,995	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 22,596,995	
7 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
9 Other U.S. Grants	\$ -	\$ 8,233,812	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,233,812	
10 City or County Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
11 State Grants	\$ -	\$ -	\$ -	\$ -	\$ 1,800	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,800	
12 Other Grants and Donations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
13 Donations / Contrib. Given to the State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
14 Sales of Goods / Services	\$ -	\$ -	\$ 3,646,141	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,646,141	
15 Sales of Data Processing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
16 Fees	\$ -	\$ -	\$ 2,933,532	\$ 2,859,170	\$ -	\$ -	\$ -	\$ 647,190	\$ -	\$ 109,395	\$ -	\$ 6,549,287	
17 Miscellaneous Receipts	\$ -	\$ -	\$ 8,848,478	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 8,848,478	
18 Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
19 Concessions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
20 Assessments / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
21 Other Receipts / Revenues ⁶	\$ 101,511	\$ 100	\$ 1,210,740	\$ 27,297	\$ -	\$ -	\$ -	\$ 2,500	\$ -	\$ 1,805	\$ -	\$ 1,343,953	
22 Subtotal:	\$ 62,986,520	\$ 8,233,912	\$ 16,638,891	\$ 2,886,467	\$ 1,800	\$ -	\$ -	\$ 649,690	\$ -	\$ 111,200	\$ -	\$ 91,508,480	
23 Transfers In	\$ -	\$ 2,169,900	\$ 638,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,808,400	
24 Total - Receipts / Revenues:	\$ 62,986,520	\$ 10,403,812	\$ 17,277,391	\$ 2,886,467	\$ 1,800	\$ -	\$ -	\$ 649,690	\$ -	\$ 111,200	\$ -	\$ 94,316,880	
25													
26 Operating Expenditures													
27 Salaries and Benefits	\$ 45,523,085	\$ 3,500,000	\$ 3,113,799	\$ 1,063,215	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 53,200,099	
28 Other Personal Services	\$ 3,019,683	\$ 620,000	\$ 494,270	\$ 601,491	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 4,735,444	
29 Expenses	\$ 12,492,389	\$ 6,276,812	\$ 7,838,794	\$ 854,221	\$ 1,800	\$ 42,000	\$ -	\$ 735,018	\$ -	\$ 321,100	\$ -	\$ 28,562,134	
30 Operating Capital Outlay	\$ 11,100	\$ 6,000	\$ 354,720	\$ -	\$ -	\$ -	\$ -	\$ 6,000	\$ -	\$ -	\$ -	\$ 377,820	
31 Risk Management	\$ 37,252	\$ -	\$ 28,550	\$ 9,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 74,802	
32 Financial Aid	\$ 1,186,500	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 1,186,500	
33 Scholarships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
34 Waivers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
35 Finance Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
36 Debt Service	\$ -	\$ -	\$ 74,242	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 74,242	
37 Salary Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
38 Law Enforcement Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
39 Library Resources	\$ 615,000	\$ -	\$ 200	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 615,200	
40 Institute of Government	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
41 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
42 Black Male Explorers Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
43 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
44 Other Operating Category (Provide Details)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	
45 Total Operating Expenditures :	\$ 62,885,009	\$ 10,402,812	\$ 11,904,575	\$ 2,527,927	\$ 1,800	\$ 42,000	\$ -	\$ 741,018	\$ -	\$ 321,100	\$ -	\$ 88,826,241	
46													

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - ST. PETERSBURG
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	-----Local Funds ⁴ -----											Summary Totals
	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance	Board - Approved Fees	Faculty Practice Plan ⁵	
47 Non-Operating Expenditures (*Amounts provided as provisional estimates pending final approval and certification of Carryforward Spending Plan and Fixed Capital Outlay Budget at a later date)												
48 * Carryforward (From Prior Period Funds)	\$ 21,817,052	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 21,817,052
49 * Fixed Capital Outlay	\$ -	\$ -	\$ 500,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 500,000
50 Transfers Out ⁶	\$ -	\$ 1,000	\$ 5,419,751	\$ 533,953	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 5,954,704
51 Other ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52 Total Non-Operating Expenditures :	\$ 21,817,052	\$ 1,000	\$ 5,919,751	\$ 533,953	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 28,271,756
53												
54 Ending Fund Balance :	\$ 3,390,567	\$ 1,215,337	\$ 19,083,273	\$ 1,905,573	\$ 13,859	\$ 4,573	\$ -	\$ 274,266	\$ -	\$ 178,625	\$ -	\$ 26,066,074
55												
56 Fund Balance Increase / Decrease :	\$ (21,715,540)	\$ -	\$ (546,935)	\$ (175,413)	\$ -	\$ (42,000)	\$ -	\$ (91,328)	\$ -	\$ (209,900)	\$ -	\$ (22,781,116)
57 Fund Balance Percentage Change :	-86.50%	0.00%	-2.79%	-8.43%	0.00%	-90.18%		-24.98%		-54.02%		-46.64%

1. The Education and General budget funds the general instruction, research, and public service operations of the universities. Universities have accumulated ending fund balances for activities such as the implementation and maintenance of Enterprise Resource Program systems, contingency for unfunded enrollment growth, potential budget reductions, anticipated increases in utilities, and prior year encumbrances (recorded, estimated liability at year-end for ordered or received goods or services), and compliance with Section 1011.45 F.S. on maintaining a 7% reserve.
2. The Contracts and Grants budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of Federal contracts or grants.
3. Auxiliaries are ancillary support units on each university campus. Some of the major activities include housing, food services, book stores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserve, repair and replacement reserves for future maintenance costs, construction/renovation of auxiliary facilities, and prior year encumbrances.
4. Local funds include the following university activities:
 - a. Student Activities - Supported primarily by the student activity and service fee and funds operations of the student government, cultural events, organizations, and intramural/club sports.
 - b. Financial Aid - This activity represents the financial aid amounts for which the university is fiscally responsible. Examples include: student financial aid fee, bright futures, federal grants, college work study, and scholarships. The ending fund balance represents a timing difference between the receipts of funds and disbursement to the students.
 - c. Concessions - These resources are generated from various vending machines located on the university campuses.
 - d. Athletics - Revenues are primarily derived from the student athletic fee, ticket sales, and sales of goods. Sufficient fund balances are maintained to provide the necessary support for ongoing athletic activities.
 - e. Technology fee - Collections are used to enhance instructional technology resources for students and faculty.
 - f. Self-Insurance Program - These programs are directed by the respective self-insurance councils and the captive insurance companies (These companies underwrite the risks of its owner and the owner's affiliates.). These activities are supported by premiums charged to the insured individuals and entities (primarily medical faculty and institutions).
 - g. Board-Approved Fees - Student fees proposed by each university and authorized by the Board of Governors to address specific student-based needs not addressed through another service or fee.
5. Faculty Practice - The Faculty Practice Plan collects and distributes income from faculty billings for patient services provided in conjunction with state university medical school programs.
6. Other Receipts/Revenues includes categories such as interest, penalties, refunds, admissions, fines, taxes, etc.
7. Other Non-Operating Expenditures includes categories such as refunds, payment of sales taxes, or indirect costs.

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - SARASOTA-MANATEE
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Local Funds ⁴					Board - Approved Fees	Faculty Practice Plan ⁵	Summary Totals
					Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance			
1 Beginning Fund Balance :	\$ 22,099,688	\$ 204,391	\$ 10,084,905	\$ 5,391,124	\$ -	\$ 10,279	\$ -	\$ 520,693	\$ -	\$ 69,692	\$ -	\$ 38,380,772
2												
3 Receipts/Revenues												
4 General Revenue	\$ 20,714,235	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,714,235
5 Lottery	\$ 3,016,031	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 3,016,031
6 Student Tuition	\$ 16,020,425	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 16,020,425
7 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
9 Other U.S. Grants	\$ -	\$ 526,812	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 526,812
10 City or County Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
11 State Grants	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
12 Other Grants and Donations	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
13 Donations / Contrib. Given to the State	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
14 Sales of Goods / Services	\$ -	\$ -	\$ 740,827	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 740,827
15 Sales of Data Processing Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
16 Fees	\$ -	\$ -	\$ 2,182,772	\$ 1,847,455	\$ -	\$ -	\$ -	\$ 437,723	\$ -	\$ 71,290	\$ -	\$ 4,539,240
17 Miscellaneous Receipts	\$ -	\$ -	\$ 171,510	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 171,510
18 Rent	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
19 Concessions	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
20 Assessments / Services	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
21 Other Receipts / Revenues ⁶	\$ 104,264	\$ -	\$ 187,882	\$ 160,000	\$ -	\$ -	\$ -	\$ 3,100	\$ -	\$ 300	\$ -	\$ 455,546
22 Subtotal:	\$ 39,854,955	\$ 526,812	\$ 3,282,991	\$ 2,007,455	\$ -	\$ -	\$ -	\$ 440,823	\$ -	\$ 71,590	\$ -	\$ 46,184,626
23 Transfers In	\$ -	\$ 127,000	\$ 268,800	\$ -	\$ -	\$ 3,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 398,800
24 Total - Receipts / Revenues:	\$ 39,854,955	\$ 653,812	\$ 3,551,791	\$ 2,007,455	\$ -	\$ 3,000	\$ -	\$ 440,823	\$ -	\$ 71,590	\$ -	\$ 46,583,426
25												
26 Operating Expenditures												
27 Salaries and Benefits	\$ 24,821,223	\$ 186,000	\$ 682,002	\$ 161,219	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 25,850,444
28 Other Personal Services	\$ 1,839,218	\$ 43,900	\$ 80,406	\$ 372,130	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 2,335,654
29 Expenses	\$ 12,062,069	\$ 599,163	\$ 1,898,802	\$ 5,176,671	\$ -	\$ 3,000	\$ -	\$ 766,723	\$ -	\$ 37,197	\$ -	\$ 20,543,625
30 Operating Capital Outlay	\$ 21,436	\$ 100	\$ 207,600	\$ -	\$ -	\$ -	\$ -	\$ 5,000	\$ -	\$ 34,093	\$ -	\$ 268,229
31 Risk Management	\$ 48,748	\$ -	\$ 107	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 48,855
32 Financial Aid	\$ 747,997	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 747,997
33 Scholarships	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
34 Waivers	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
35 Finance Expense	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
36 Debt Service	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
37 Salary Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
38 Law Enforcement Incentive Payments	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
39 Library Resources	\$ 210,000	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 210,000
40 Institute of Government	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
41 Regional Data Centers - SUS	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
42 Black Male Explorers Program	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
43 Phosphate Research	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
44 Other Operating Category (Provide Details)	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
45 Total Operating Expenditures :	\$ 39,750,691	\$ 829,163	\$ 2,868,917	\$ 5,710,020	\$ -	\$ 3,000	\$ -	\$ 771,723	\$ -	\$ 71,290	\$ -	\$ 50,004,804
46												

Special Board of Trustees Meeting - New Business - Action Items

UNIVERSITY OF SOUTH FLORIDA - SARASOTA-MANATEE
STATE UNIVERSITY SYSTEM OF FLORIDA
2022-2023 OPERATING BUDGET
SUMMARY SCHEDULE I

	-----Local Funds ⁴ -----											Summary Totals
	Education & General ¹	Contracts & Grants ²	Auxiliaries ³	Student Activities	Student Financial Aid	Concessions	Intercollegiate Athletics	Technology Fee	Self-Insurance	Board - Approved Fees	Faculty Practice Plan ⁵	
47 Non-Operating Expenditures (*Amounts provided as provisional estimates pending final approval and certification of Carryforward Spending Plan and Fixed Capital Outlay Budget at a later date)												
48 * Carryforward (From Prior Period Funds)	\$ 20,683,843	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,683,843
49 * Fixed Capital Outlay	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
50 Transfers Out ⁶	\$ -	\$ 10,000	\$ 41,900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 51,900
51 Other ⁷	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -
52 Total Non-Operating Expenditures :	\$ 20,683,843	\$ 10,000	\$ 41,900	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ -	\$ 20,735,743
53												
54 Ending Fund Balance :	\$ 1,520,109	\$ 19,040	\$ 10,725,879	\$ 1,688,559	\$ -	\$ 10,279	\$ -	\$ 189,793	\$ -	\$ 69,992	\$ -	\$ 14,223,651
55												
56 Fund Balance Increase / Decrease :	\$ (20,579,579)	\$ (185,351)	\$ 640,974	\$ (3,702,565)	\$ -	\$ -	\$ -	\$ (330,900)	\$ -	\$ 300	\$ -	\$ (24,157,121)
57 Fund Balance Percentage Change :	-93.12%	-90.68%	6.36%	-68.68%		0.00%		-63.55%		0.43%		-62.94%

1. The Education and General budget funds the general instruction, research, and public service operations of the universities. Universities have accumulated ending fund balances for activities such as the implementation and maintenance of Enterprise Resource Program systems, contingency for unfunded enrollment growth, potential budget reductions, anticipated increases in utilities, and prior year encumbrances (recorded, estimated liability at year-end for ordered or received goods or services), and compliance with Section 1011.45 F.S. on maintaining a 7% reserve.
2. The Contracts and Grants budget contains activities in support of research, public service, and training. Large fund balances are due to the timing of receipt of Federal contracts or grants.
3. Auxiliaries are ancillary support units on each university campus. Some of the major activities include housing, food services, book stores, student health centers, facilities management, and computer support. Ending fund balances includes financial activities such as debt service payments, reserve, repair and replacement reserves for future maintenance costs, construction/renovation of auxiliary facilities, and prior year encumbrances.
4. Local funds include the following university activities:
 - a. Student Activities - Supported primarily by the student activity and service fee and funds operations of the student government, cultural events, organizations, and intramural/club sports.
 - b. Financial Aid - This activity represents the financial aid amounts for which the university is fiscally responsible. Examples include: student financial aid fee, bright futures, federal grants, college work study, and scholarships. The ending fund balance represents a timing difference between the receipts of funds and disbursement to the students.
 - c. Concessions - These resources are generated from various vending machines located on the university campuses.
 - d. Athletics - Revenues are primarily derived from the student athletic fee, ticket sales, and sales of goods. Sufficient fund balances are maintained to provide the necessary support for ongoing athletic activities.
 - e. Technology fee - Collections are used to enhance instructional technology resources for students and faculty.
 - f. Self-Insurance Program - These programs are directed by the respective self-insurance councils and the captive insurance companies (These companies underwrite the risks of its owner and the owner's affiliates.). These activities are supported by premiums charged to the insured individuals and entities (primarily medical faculty and institutions).
 - g. Board-Approved Fees - Student fees proposed by each university and authorized by the Board of Governors to address specific student-based needs not addressed through another service or fee.
5. Faculty Practice - The Faculty Practice Plan collects and distributes income from faculty billings for patient services provided in conjunction with state university medical school programs.
6. Other Receipts/Revenues includes categories such as interest, penalties, refunds, admissions, fines, taxes, etc.
7. Other Non-Operating Expenditures includes categories such as refunds, payment of sales taxes, or indirect costs.

Agenda Item: FL 102

USF Board of Trustees
August 19, 2022

Issue: The University of South Florida and the United Faculty of Florida/Graduate Assistants United (“UFF/GAU”) reached a tentative new Collective Bargaining Agreement (“CBA”). GAU ratified the agreement on August 8, 2022, and ratification by the Board is required for the CBA to go into effect.

Proposed action: Ratify the 2022-2025 CBA between the University of South Florida Board of Trustees and GAU.

Executive Summary:

1. The new contract would be effective upon ratification by both parties and would expire on June 30, 2025.
2. The parties have tentatively agreed to the following provisions in the agreement, as summarized below for convenience:

- **Article 23.1. Increase in minimum stipends over the three years of the CBA:**

(9-month stipend; .5 FTE)

Fall 2022	Masters: \$13,750 Doctoral: \$19,613
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Fall 2023	Masters: \$14,575 Doctoral: \$20,594
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Fall 2024	Masters: \$15,304 Doctoral: \$21,624
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- The estimated cost of the increase over the three-year contract is \$7.7 Million [YR 1: \$3.9 Million (10% increase); YRS 2 &3: \$1.9 Million each (5% increase)]
- **Article 23.3.** Employer’s Contribution to Health Insurance. Effective August 1, 2022 to July 31, 2025, the University agrees to pay the health

insurance premiums up to a maximum annualized amount of \$2762 for each graduate assistant appointed at .25 FTE or greater who elects individual coverage under the USF Student Health Insurance Plan during said period.

Article 21. This article was modified to reflect the new dates when the CBA is in effect.

Financial Impact: See Above

Strategic Goal(s) Item Supports: This agreement enables the University to promote and sustain a positive working environment, high service quality, and strong graduate assistants through competitive wages.

BOT Committee Review Date: n/a

Supporting Documentation Online: Yes

Prepared by: Liz Gierbolini, Senior Associate General Counsel

Collective Bargaining Agreement

2022-2025

University of South Florida

and

United Faculty of Florida/Graduate Assistants United

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1

2

Preamble

3

4 A Graduate Assistant (GA) is first and foremost a student who is engaged in the continued
5 process of training and acquisition of knowledge in order to enhance employability in the job
6 market. A Graduate Assistantship is contingent upon admission to a formal graduate
7 program. While an academically qualified student admitted to a graduate program who
8 achieves a certain level of academic standard may be provided a subsidized financial
9 package in the form of a Fellowship or Graduate Assistantship, it is never the case that an
10 individual is employed as a Graduate Assistant prior to admission to a graduate program.

11 The intent of the University of South Florida Board of Trustees (hereafter the University) and
12 the United Faculty of Florida/Graduate Assistants United (hereafter UFF-USF-GAU) in
13 carrying out negotiations for the members of the bargaining unit is to advance the quality and
14 effectiveness of graduate education at the University of South Florida (hereafter USF), and
15 to make the University a desirable place to teach and research. The University and the UFF-
16 USF-GAU aim to maintain high standards in all phases of administration, instruction,
17 research, and service. The University and the UFF-USF- GAU recognize the mutual benefits
18 of continual improvement through amicable adjustment of matters of mutual interest.

19 The parties recognize the unique contributions of graduate assistants to the work of the
20 University. Graduate assistants play a key role in the teaching and research endeavors of the
21 University. A competitive compensation package which enables the University to attract and
22 retain highly qualified graduate assistants is desirable.

23 The University and the UFF-USF-GAU also recognize the value of a governance system for
24 graduate assistants in areas of academic concern, and that shared governance within this
25 system be maintained and strengthened. The University's academic governance system shall
26 recognize the participation of graduate assistants, at appropriate levels and with reasonable
27 rights and privileges. Matters which may benefit from the involvement of graduate assistants,
28 and to which they may contribute their experience and knowledge include: (a) curriculum
29 policy and structure; (b) requirements for degrees; (c) policies for recruitment and retention
30 of students; (d) development or reorganization of academic programs; (e) grading policies;
31 and (f) other matters of traditional academic concern. The President or representative may
32 confer with Graduate Student Councils or similar bodies on all matters of academic concern;
33 however, the University and the UFF-USF-GAU understand that such conferences shall not
34 interfere with the exclusive right of UFF-USF-GAU under this collective bargaining agreement
35 to negotiate the terms and conditions of employment for graduate assistants at USF.

36 This Preamble is a statement of intent and is, therefore, not subject to Article 11, Grievance
37 Procedure.

38

39

Article 1

40

Recognition

41 1.1 Bargaining Unit. Pursuant to the certification of the Florida Public Employees Relations
42 Commission, dated June 18, 1980, as amended by Public Employees Relations Commission
43 Order Number 03E-170 dated July 17, 2003, which can be located at 29 FPER P 180,
44 certifying the United Faculty of Florida (UFF-USF-GAU) as the exclusive representative,
45 solely for the purpose of collective bargaining with respect to wages, hours, and other
46 conditions of employment as specifically set forth in the Agreement, for all employees in the
47 bargaining unit described in said certification, the University has entered into this Agreement.
48 The bargaining unit is described as employees holding the following titles at the University of
49 South Florida:

50 Graduate Research Assistant (Class Code 9182),
51 Graduate Research Associate (Class Code 9181),
52 Graduate Teaching Assistant (Class Code 9184),
53 Graduate Teaching Associate (Class Code 9183),
54 Graduate Assistant (Class Code 9185), and
55 Graduate Instructional Assistant (Class Code 9550).

56

57 Graduate assistant job classifications and class codes are located at:

58

59 [https://www.usf.edu/hr/documents/employment-resources/employment-](https://www.usf.edu/hr/documents/employment-resources/employment-changes/appointment-temp-job-code-descriptions.pdf)
60 [changes/appointment-temp-job-code-descriptions.pdf](https://www.usf.edu/hr/documents/employment-resources/employment-changes/appointment-temp-job-code-descriptions.pdf)

61

62 and can be found in section 2.5 of the Graduate Assistant Handbook:

63

64 [https://www.usf.edu/graduate-studies/funding/graduate-assistantships-resource-](https://www.usf.edu/graduate-studies/funding/graduate-assistantships-resource-center/graduate-assistant-handbook.aspx)
65 [center/graduate-assistant-handbook.aspx](https://www.usf.edu/graduate-studies/funding/graduate-assistantships-resource-center/graduate-assistant-handbook.aspx)

66

67

68 1.2 Exceptions. Nothing contained in this Agreement shall be construed to prevent the
69 University or its representatives from meeting with any individual or organization or hear views
70 on any matter; provided, however, that as to any such matter which is a proper subject of
71 collective bargaining and covered by a term of this Agreement, any changes or modification
72 shall be made only through negotiations and agreement with UFF-USF-GAU.

73

Article 2

74

Appointments, Reappointments, and Terminations

75 2.1 Letter of Appointment. The University shall make appointments on letters, signed by a
76 representative of the University and the appointee. The letter of appointment shall be sent to
77 the appointee within ten (10) days after the conditions necessary for the appointment have
78 been met. No salary shall be paid in the absence of a signed letter of appointment properly
79 on file with the University. The employing department shall ensure that the signed letter of
80 appointment is properly on file. The University may add additional informational items but

81 may not thereby abridge the rights or benefits provided in this Agreement. The letter shall
82 contain the following elements as a minimum:

83 (A) Date;

84 (B) Classification title and class code;

85 (C) Employment unit (e.g., department, college, institute, area, center, etc.);

86 (D) Length of appointment and a statement that no department or University
87 representative may make a binding agreement to reappoint the employee for longer
88 than the term of the contract. Research grants, advisor's promises, and departmental
89 agreements are not binding;

90 (E) Special conditions of employment;

91 (F) Name of supervisor and a statement that the supervisor may or may not be the
92 same person as the academic advisor or committee chair;

93 (G) A statement that the employee's signature thereon shall not be deemed a waiver
94 of the right to process a grievance with respect thereto in compliance with Article 11,
95 Grievance Procedure;

96 (H) A statement that the employee's appointment makes an employee eligible to apply
97 for but does not guarantee a tuition payment. The parties acknowledge that employees
98 need this information as soon as available. Thus, employees will be notified in a timely
99 manner whether they will receive tuition payment under the University tuition payment
100 program.

101 (I) A statement that the appointment is contingent upon the employee providing
102 required documentation of employability;

103 (J) A statement that the appointment is subject to the Constitution and laws of the
104 State of Florida and the United States, the regulations of the University, and this
105 Agreement;

106 (K) Percent of full-time equivalent (FTE) assigned, and the corresponding average
107 hours per week as defined in Article 6.1(A);

108 (L) Stipend based on appointment and the amount paid per biweekly pay period;

109 (M) A notice specifying the location of the employee's official evaluation file and stating
110 the employee's right to access such file; and

111 (N) A statement that "All graduate assistants at USF work under a contract negotiated
112 by Graduate Assistants United (GAU) and the Board of Trustees. GAU is the labor
113 union certified as the exclusive bargaining agent for graduate assistants at USF."

114 (O) A separate signature block with a statement that the employee's signature below
115 indicates consent by the student to release of his or her campus email address to GAU

116 in accordance with Article 17.6 (A).

117 (P) A statement that the employee may be eligible for a health insurance subsidy, that
118 the employees must self-enroll for the health insurance policy, and instructions on
119 how, when, and where to self-enroll.

120 2.2 Reappointments. No appointment shall create any right, interest, or expectancy in any
121 other appointment beyond its specific term. Upon written request, the UFF-USF- GAU shall
122 be provided information regarding established guidelines for graduate assistant
123 appointments. When appointed, employees shall be provided with criteria concerning
124 reappointment.

125 2.3 Length of Appointment. Appointments may be for any period of time up to one (1) calendar
126 year. Each College of the University shall appoint the majority of its .5 FTE Graduate Assistant
127 positions (9183, 9184, 9185, 9550) to an appointment of at least one (1) academic year,
128 consistent with the faculty calendar (19.5 pay periods). Graduate assistants (9181, 9182) who
129 are supported on grants and contracts will only be appointed for one (1) academic year
130 dependent upon the availability and duration of the grant or contract funding.

131 2.4 Notice. Timely processing of appointment letters is fundamental to the efficient operation
132 of the University and subject to special consultation pursuant to Article 24.2.

133 A. Fall Appointments. Employees serving in at least one (1) semester appointment
134 during an academic year shall be provided with a letter of intent regarding continuation
135 or non-continuation of employment for the subsequent Fall semester by April 30, if
136 practicable. A final letter of appointment, if necessary, shall be provided to the
137 employee by June 30, if practicable.

138 B. Spring Appointments. Employees who will be offered an appointment to commence
139 at the start of the Spring semester shall be provided with a letter of intent by August
140 30, if practicable. A final letter of appointment for mid-year appointees, if necessary,
141 shall be provided to the employee by October 30, if practicable.

142 C. Examples of matters which may result in a delay in notification include, but are not
143 limited to, funding not finalized or course offerings or schedule not finalized.

144 D. When formal written offer letters are made, but are not provided by the above
145 deadlines, the employing department shall issue the Notice found in Appendix F.

146 2.5 Changes in appointment.

147 A. Any appointment may be curtailed, diminished, or terminated at any time by reason
148 of the following documented circumstances:

- 149 (1) unsatisfactory performance of assigned duties;
- 150 (2) unsatisfactory performance in coursework and/or progress toward degree;
- 151 (3) incompetence or misconduct of the employee;
- 152 (4) lack of funds as a result of adverse financial conditions;
- 153 (5) completion of degree requirements.

154
155 B. The University shall provide two weeks' written notice in any change in appointment
156 in the case of 2.5A (1) (2), (4), and (6).

157 C. The University shall provide at least two weeks' written notice in the case of 2.5A
158 (4). Whenever financially feasible additional notice may be provided, up to a semester
159 of advance notice. In these cases the University shall:

160 (1) Include in the notice of non-reappointment that the action is taken as a result
161 of adverse financial conditions and does not reflect on the performance of the
162 employee; and

163 (2) Make reasonable efforts to assist the employee in finding alternate
164 employment through consideration for other vacancies appropriate for the skills
165 of the employee.

166 D. The University shall provide written notice of non-reappointment. The notice shall
167 include a statement which indicates that the action is grievable under the provisions
168 of the USF/UFF-USF-GAU Collective Bargaining Agreement. An employee who
169 receives a written notice of non-reappointment shall be entitled, upon written request
170 within fourteen (14) days following receipt of such notice, to a written statement of the
171 basis for the decision not to reappoint. The University shall provide such statement
172 fourteen (14) days following receipt of such request. Deadline for notices of Fall and
173 Spring non-reappointment shall be April 30 and October 31 as specified in 2.4 A and
174 B respectively. (Amended 2016)

175 E. When the University has reason to believe that the employee's presence on the job
176 will adversely affect the operation of the University, the University may immediately
177 place the employee on leave with pay, pending investigation of the event(s) leading to
178 that belief. However, such leave with pay shall not extend beyond the semester in
179 which the action is taken.

180 F. Job Abandonment. Job abandonment is defined as three consecutive scheduled
181 days of work that are missed without communication from student employees to their
182 immediate supervisor. Student employees terminated for job abandonment whose
183 lack of communication about the absence is caused by extenuating circumstances
184 that make it impossible for them to call in to notify their immediate supervisor about
185 the absence may be reinstated to their previous position upon providing an
186 explanation that is deemed satisfactory by their supervisor and/or department. After
187 student employees fail to report to work for three consecutive scheduled days of work,
188 the department will send student employees written notice, via the student employees'
189 USF email accounts and via certified mail, return/receipt requested or hand delivery,
190 notifying student employees of the proposed termination for job abandonment.
191 Student employees will have five business days to respond in writing to the proposed
192 employment action before the proposed action becomes final.

193

194

195

Article 3

196

Employment Performance Evaluation

197 3.1 Policy. A comprehensive annual performance appraisal for each employee, whose term
198 of appointment is one (1) semester or longer, shall be evaluated in writing once during each
199 such appointment. The University-wide comprehensive annual performance appraisal format
200 will be used for all appraisals. The employment evaluation shall include evaluation of
201 assigned duties and such other responsibilities as are appropriate to the assignment.
202 Additional consideration will be given to the satisfactory progress towards completion of the
203 degree program according to University policy. Personnel decisions shall take such
204 employment evaluations into account, provided that personnel decisions need not be based
205 solely on written employment performance evaluations. The Graduate Program Director will
206 certify completion of the annual performance appraisal for each employee to the Graduate
207 School.

208 3.2 Procedures. The comprehensive annual performance appraisal shall be discussed with
209 the employee, at which time any deficiencies shall be specifically noted and suggestions for
210 their improvement made. A reasonable schedule shall be given to accomplish the necessary
211 improvements. Such evaluation shall be placed in the employee's evaluation file. The
212 comprehensive annual performance appraisal shall be signed by the person who performed
213 the evaluation and shall be shown to the employee, who shall be given the opportunity to sign
214 it. A copy of the comprehensive annual performance appraisal shall be given to the employee.
215 The employee may attach a concise comment to the comprehensive annual performance
216 appraisal form. Written student comments or evaluations need not be signed to be used for
217 evaluation purposes. If the performance evaluation is not completed in accordance with 3.1,
218 the employee's performance shall be deemed satisfactory for the covered period.

219 3.3 Observations and Visitations. Observations or visitations for the purpose of evaluating
220 employee performance may be either announced or unannounced.

221 (1) Within two (2) weeks after an observation or visitation, the employee shall have an
222 opportunity to meet and discuss the observation or visitation with the observer. The
223 University and the UFF-USF-GAU agree that it is beneficial for the employee and the
224 observer to meet as soon as possible after the observation.

225 (2) A concise written comment by the observer regarding the observation or visitation
226 shall be placed in the evaluation file. A copy of such comment shall be given to the
227 employee no later than two (2) weeks following the observation, unless the employee
228 and observer agree to extend the time period or there is a documented unavailability
229 of either party. Such comment shall not be grievable; however, the employee shall
230 have the right to respond in writing and shall have such response attached. The
231 employee shall have the right, to be exercised within three (3) working days after the
232 meeting with the observer, to request in writing an additional observation or visitation
233 by a different observer. Such additional observation or visitation shall be accomplished
234 prior to the end of the semester, and shall be placed in the evaluation file. The
235 employee shall have the right to respond to this observation also and have the
236 response attached.

237 3.4 Criteria. The comprehensive annual performance appraisal shall be based upon assigned
238 duties, and shall consider the nature of the assignment, in terms where applicable, of:

239 A. Teaching effectiveness, including effectiveness in presenting knowledge,
240 information, and ideas by means or methods such as lecture, discussion, assignment
241 and recitation, demonstration, laboratory exercise, practical experience, and direct
242 consultation with students. The evaluation shall include consideration of effectiveness
243 in imparting knowledge and skills, and effectiveness in stimulating students' critical
244 thinking and/or creative abilities, and adherence to accepted standards of professional
245 behavior in meeting responsibilities to students.

246 B. Contribution to the discovery of new knowledge, development of new educational
247 techniques, and other forms of creative activity. The evaluation shall include
248 consideration of the employee's productivity, including the quality and quantity of what
249 has been done during the year, and of the employee's research and other creative
250 programs and contributions; and recognition by the academic or professional
251 community of what is done.

252 C. Service to, and awards by, international, professional, state, and community
253 organizations.

254 D. The employee must show progress toward degree completion in a timely fashion
255 to assure successful completion of the degree within the timelines established by
256 University policy.

257 **Article 4**
258 **Employee Evaluation File**

259 4.1 Policy. There shall be only one (1) employee evaluation file in which all written materials
260 used to evaluate employee performance are maintained so that when evaluations and
261 personnel decisions are made, the only documents which may be used are those contained
262 in that file. The evaluation file shall be separate from the student and medical records
263 maintained by the University and shall be located in the official personnel file maintained in
264 the Human Resources Office.

265 4.2 Access. An employee may examine the employee evaluation file upon reasonable
266 advance notice, during the regular business hours of the office in which the file is kept,
267 normally within the same business day as the employee requests to see it and under such
268 conditions as are necessary to insure its integrity and safekeeping. Upon request, an
269 employee may paginate with successive whole numbers the materials in the file, and may
270 attach a concise statement in response to any item therein. Upon request, an employee is
271 entitled to one (1) free copy of any material in the evaluation file. Additional copies may be
272 obtained by the employee upon payment of a reasonable fee for photocopying. A person
273 designated by the employee may examine that employee's evaluation file with the written
274 authorization of the employee concerned and subject to the same limitations on access that
275 are applicable to the employee.

276 4.3 Indemnification. UFF-USF-GAU agrees to indemnify and hold the University, and its
277 officials, agents, and representatives harmless from and against any and all liability for any

278 improper, illegal, or unauthorized use by UFF-USF-GAU of information contained in such
279 employee evaluation file.

280 4.4 Use of Evaluative Material. In the event a grievance proceeds to arbitration, the University,
281 UFF-USF-GAU, the arbitrator, and the grievant shall have the right to use copies of materials
282 from the grievant's evaluation file relevant thereto in the arbitration proceedings.

283 4.5 Anonymous Material. No anonymous material shall be placed in an employee evaluation
284 file, except for student evaluations which are part of a regular evaluation procedure of
285 classroom instruction.

286 4.6 Materials in Evaluation File. Evaluative materials or summaries thereof, prepared as part
287 of a regular employee evaluation system, may be placed in an employee evaluation file after
288 a copy has been presented to the employee for signature. The employee's signature does
289 not necessarily indicate agreement with the contents of the document. The employee may
290 append a written statement to the evaluation expressing their interpretation of the evaluation.

291 4.7 Removal of Contents. Materials shown to be contrary to fact shall be removed from the
292 file. This section shall not authorize the removal of materials from the employee evaluation
293 file when there is a dispute concerning a matter of judgment or opinion rather than fact.
294 Materials may also be removed pursuant to the resolution of a grievance. The parties to this
295 Agreement acknowledge the requirements of the public records law and nothing contained
296 herein shall authorize any action contrary to law. The union encourages employees to collect
297 information from their own file and make it available for viewing to their representative if
298 necessary, so the University and its staff are not unduly burdened with compliance.

299 4.8 Only University officials with a business need may inspect information reflecting
300 evaluations of employee performance in accordance with applicable law.

301 **Article 5**

302 **Academic Freedom and Responsibility**

303 5.1 The University of South Florida affirms the principles of academic freedom and
304 responsibility, which are rooted in a conception of the University as a community of scholars
305 united in the pursuit of truth and wisdom in an atmosphere of tolerance and freedom.

306 5.2 Academic Freedom is the freedom to discuss all relevant matters in the classroom, to
307 explore all avenues of scholarship, research, and creative expression; to speak freely on all
308 matters of university governance, and to speak, write, or act as an individual, all without
309 institutional discipline or restraint.

310 5.3 Academic Responsibility implies the honest performance of academic duties and
311 obligations, the commitment to support the responsible exercise of freedom by others, and
312 the candor to make it clear that the individual, while he or she may be freely identified as an
313 employee of the University, is not speaking as a representative of the University in matters of
314 public interest.

315 5.4 On the part of the Administration, Academic Responsibility implies a commitment actively
316 to foster within the University a climate favorable to responsible exercise of freedom.

317 **Article 6**

318 **Workload**

319 6.1 Assignment of Responsibilities. The parties understand that, while hourly rate may be
320 used in statistical calculations or to report the fulfillment of duties to governing agencies,
321 graduate assistants who are employed as research, teaching or instructional assistants
322 (Class codes 9181, 9182, 9183, 9184, 9550) are salaried employees. Graduate assistants
323 employed in Class code 9185 are appointed as non-exempt hourly employees and will need
324 to complete a time sheet. Time clocks shall not be used to record work hours.

325 A. No employee shall be assigned employment responsibilities during a semester that
326 exceed an average of ten (10) hours per week for one-fourth time; thirteen and one
327 third (13.3) hours per week for one-third time; twenty (20) hours per week for a one
328 half time appointment; or thirty (30) hours per week for a three-quarter time
329 appointment. The same proportional relationship applies to all other FTE's.

330 B. For the purposes of determining whether an assignment can be accomplished
331 within the time limitations described herein, research and other activities that lead
332 directly to an employee's thesis, dissertation, or other degree requirements need not
333 be counted as part of the assigned workload.

334 6.2 Request for Clarification of FTE Calculation. Upon request by an employee, a department
335 shall provide a description of its expectations for FTE.

336 6.3 Grievability. In the event an employee has reason to believe that the assignment exceeds
337 the guidelines described in Article 6.1(A), the employee may file a grievance pursuant to the
338 procedures in Article 11.

339 **Article 7**

340 **Outside Activity/Conflict of Interest**

341 7.1 Policy. Outside employment or other activities that interfere with an employee's obligation
342 to the University or that constitute a conflict of interest are prohibited. No employee who
343 engages in outside employment or other activity shall claim to be an official University
344 representative in connection with an outside employment or other activity. No employee may
345 use University personnel, equipment, or facilities in

346 connection with the outside employment or activity without prior approval of the President or
347 representative. Approval for the use of University facilities, equipment, or services may be
348 conditioned upon reimbursement for the use thereof.

349 7.2 Report of Outside Activity. Any employee who proposes to engage in any outside activity
350 that the employee should reasonably conclude may create a conflict of interest, or any
351 compensated professional activity, shall report to the employee's supervisor, in writing on the

352 University form prescribed for such report, the details of such proposed activity prior to
353 engaging therein. The University agrees to consult with the GAU regarding any changes to
354 the form for reporting outside activity.

355 **Article 8**

356 **Nondiscrimination**

357 8.1 Policy. Neither the University nor UFF-USF-GAU shall discriminate against any employee
358 based upon race, color, sex, religion, national origin, age, veteran status, disability, or marital
359 status, consistent with federal and state law, nor shall the parties discriminate based upon
360 sexual orientation or membership or non-membership in a union. The University agrees that
361 personnel decisions, including reappointment, promotion, evaluation and disciplining of an
362 employee, shall be based solely on job- related criteria and performance.

363 A. Sexual harassment is a form of prohibited sex discrimination which is prohibited
364 both by law and University policy. In Meritor Savings Bank v. Vinson, 106 S. Ct. 2399
365 (1986), the United States Supreme Court defined sexual harassment (29 CFR
366 1604.11a) in the employment context as including the following:

367 Unwelcome sexual advances, requests for sexual favors, and other verbal or physical
368 conduct of a sexual nature constitute sexual harassment when (1) submission to such
369 conduct is made either explicitly or implicitly a term or condition of an individual's
370 employment, (2) submission to or rejection of such conduct by an individual is used
371 as the basis for employment decisions affecting such individual, or (3) such conduct
372 has the purpose or effect of unreasonably interfering with an individual's work
373 performance or creating an intimidating, hostile, or offensive working environment.

374 B. To promote an environment at the University which is free from unlawful
375 discrimination and harassment, graduate assistants are encouraged to report
376 immediately any concerns regarding discrimination or sexual harassment. Graduate
377 assistants acting in a supervisory capacity (including supervisors of laboratories) or
378 teaching capacity are required to report allegations from their students or those they
379 supervise regarding discrimination, including sexual harassment, to appropriate
380 administrators. Appropriate administrators include, but are not limited to, the
381 employee's immediate supervisor, graduate coordinator, department chair, or Dean,
382 or administrators in the University's Diversity, Equity and Inclusion (DEI) or Human
383 Resources Department.

384 C. Claims of discrimination, including sexual harassment, must be processed with the
385 University DEI office rather than through the Article 11 grievance process. Employees
386 who file a complaint with DEI will be notified of their right to file a complaint with outside
387 agencies. More information may be located at the DEI website.

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Article 9

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Copyrights and Patents

393 9.1 Disclosure. An employee shall disclose all patentable inventions and technological
394 developments which the employee may develop or discover while an employee of the
395 University. With respect to inventions made during the course of approved outside
396 employment, the employee may delay such disclosure for no more than one hundred and
397 eighty (180) days, when necessary to protect the outside employer's interests, until the
398 decision has been made whether to seek a patent.

399 9.2 Waiver of Rights. While an employee may, in accordance with Article 7, Outside
400 Activity/Conflict of Interest, engage in outside employment pursuant to a consulting
401 agreement, the Office of Academic Affairs and the Office of Research must approve any
402 requirement by the outside employer that the employee waive the employee's/University's
403 rights to any patentable invention or discoveries which arise during the course of such outside
404 employment. An employee who proposes to engage in outside employment shall furnish a
405 copy of the University's patents policy to the outside employer prior to or at the time the
406 consulting agreement is executed.

407 9.3 Federal Sponsorship. If the employee's activities involve inventions or discoveries
408 conceived under Federal sponsorship or supported by University funds or resources, then
409 the Office of Academic Affairs and the Office of Research shall not grant permission to waive
410 patent rights.

411 9.4 Reporting Procedures. The employee shall report directly to USF Division of Patents and
412 Licensing the nature of the discovery or new invention, together with an outline of the project
413 and the conditions under which it was done. If the University wishes to assert its interest in
414 the patent, the USF Division of Patents and Licensing shall inform the employee within a
415 maximum of one hundred and thirty-five (135) days. It is understood that every effort shall be
416 made at appropriate administrative levels to expedite the decision-making process to
417 minimize the time involved. The division of proceeds between the University and the
418 employee generated by the licensing of patent rights or trade secrets shall be negotiated and
419 reflected in a written contract between the University and the employee. All such agreements
420 shall comport with and satisfy any preexisting commitments to outside sponsoring agencies,
421 but the employee shall not commit any act which would tend to defeat the University's interest
422 in the matter, and the University shall take any necessary steps to protect such interest.

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Article 10

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426

Leaves of Absence and Other Leave

427 10.1 Each employee shall be credited with five (5) days of paid leave per semester
428 appointment. Such paid leave shall be used in increments of not less than one (1) day. For
429 example, an employee scheduled to work six (6) hours on Monday and three (3) hours on
430 Tuesday, who is unable to perform assigned duties on these days for any of the reasons
431 described below, would be charged with two (2) days of leave, regardless of FTE
432 appointment, or number of work hours scheduled. The leave provided under this article shall
433 not be cumulative.

434 10.2 An employee may use paid leave described in 10.1 above when:

435 A. Disabled or otherwise unable to perform because of injury, illness, jury duty, required U.S.
436 military service, or when unable to so perform because the employee's presence is required
437 elsewhere because of injury, illness, or death in the immediate family. Immediate family shall
438 consist of mother, father, spouse or domestic partner, sister, brother, child, a person in a legal
439 dependent relationship with the employee, or other relative living in the employee's
440 household. The employee shall notify the supervisor of the inability to serve as soon as
441 possible.

442 B. Taking examinations for professional licensing related to the degree or qualifying
443 examinations as required by the University.

444 C. Traveling to conferences or other events for professional development. Employees
445 travelling to conferences required by their graduate program may work with their supervisor
446 to find another Graduate Assistant to carry out their duties on a volunteer basis instead of
447 using paid leave.

448 10.3 An employee shall not be required to use leave when the University is officially closed,
449 unless the special conditions of the appointment require the employee to perform duties at
450 these times.

451 10.4 Release Time.

452 A. A unit of release time shall equal 10 hours per week. Release time may be allocated
453 in increments of 5 or 10 hours per week, The University agrees to provide up to 3 total
454 units of release time per semester during the academic year (Fall and Spring) and 2
455 total unit of release time during the Summer semester to employees designated by
456 the UFF-USF-GAU for the purpose of carrying out the UFF-USF-GAU's obligations in
457 representing employees and administering this Agreement. The UFF-USF-GAU may
458 designate employees to receive this release time subject to the following conditions:

459 (1) No more than one employee per department may be granted release time
460 at any one time, unless that department employs more than twenty- five (25)
461 employees.

462 (2) The award of release time shall not reduce the workload obligation of a
463 graduate assistant below 10 hours per week.

464 (3) An employee who has been granted release time for two consecutive
465 semesters shall not again be eligible for release time until two consecutive
466 semesters have elapsed following the end of the second semester in which
467 such release time was granted.

468 (4) The UFF-USF-GAU shall provide the University with a list of requested
469 designees at least four (4) weeks prior to the first day of classes for the
470 semester. The list will indicate each employee's requested FTE for release
471 time. Upon approval of the designees by the University, the designees shall
472 serve for one (1) academic year. Substitutions for the Spring semester may be

473 made upon written notification submitted by the UFF-USF-GAU to the
474 University no later than four (4) weeks prior to the first day of classes for the
475 Spring semester.

476 (5) Employees on release time must remain students in good standing at the
477 University during their release time appointment.

478 B. Release time shall be used for conducting University-related UFF-USF-GAU
479 business, and shall not be used for lobbying or other political representation except in
480 accordance with state or federal law.

481 C. Upon the failure of the UFF-USF-GAU to provide a list of designees by the specified
482 deadlines, the University may refuse to honor any of the release time requests which
483 were submitted late. Substitutions submitted after the deadlines in Article 10.4(A)(4)
484 shall be allowed at the discretion of the University.

485 D. Employees on release time shall be eligible for stipend increases on the same basis
486 as other employees, but their release time activities shall not be evaluated nor taken
487 into consideration by the University in making personnel decisions.

488 E. Employees on release time shall retain all rights and responsibilities as employees,
489 but shall not be considered representatives or agents of the University for any activities
490 undertaken on behalf of the UFF-USF-GAU. UFF- USF-GAU agrees to hold the
491 University harmless for any claims arising from such activities, including the cost of
492 defending against such claims.

493 10.5 Unpaid Leave

494 A. Graduate assistants shall be eligible for six (6) weeks of unpaid leave from their
495 employment responsibilities during any 12-month period for one of more of the
496 following reasons:

- 497 (1) The birth of a child and in order to care for that child;
498 (2) The placement of a child with a graduate assistant for adoption or foster
499 care;
500 (3) To provide the care for a serious health condition of a spouse, domestic
501 partner, mother, father, brother, sister, child, legal dependent, or a relative
502 living in the graduate assistant's household;
503 (4) A serious health condition of the graduate assistant which makes the GA
504 unable to perform his or her essential job duties,
505

506 B. The graduate assistant shall provide the University with written notice not less than
507 thirty (30) days prior to the date of the requested leave, if practicable. In the case of
508 emergency, the graduate assistant must give verbal notice within twenty-four (24)
509 hours of taking leave. In the case of a serious health condition, the University may
510 request medical verification from a health care provider. The University may also
511 require the GA to see a medical provider of the University's choice and at the
512 University's expense.

513 C. Unpaid leave, including extensions, shall be at the sole discretion of the University.

514 D. The GA is eligible to return to the same or similar position at the conclusion of the
515 leave. This return provision does not apply if the return date is after the completion of
516 an employment contract.

517 E. The University shall continue to pay the health care premiums during the duration
518 of the GA's leave. If applicable, the University tuition waiver shall be maintained.

519 F. A GA must be in at least a second semester of employment as a graduate assistant
520 to be eligible for this leave provision.

521 G. This unpaid leave, if granted, does not relieve the GA from meeting his/her program
522 responsibilities. A separate arrangement must be made with the Director of Graduate
523 Studies of the Department of the Department Chair, which-ever is applicable.

524 10.6 Parental Leave

525 The parties agree to review the subject of possible paid parental leave during
526 successor negotiations

527 **Article 11**
528 **Grievance Procedure and Arbitration**

529 11.1 Purpose. The University and the UFF-USF-GAU agree that all problems should be
530 resolved, whenever possible, before the filing of a grievance and they encourage open
531 communication between administrators and employees so that resort to the formal grievance
532 procedure will not be necessary. The parties further encourage the informal resolution of
533 grievances. At each step in the grievance process, participants are encouraged to pursue
534 appropriate modes of conflict resolution. The purpose of this Article is to promote a prompt
535 and efficient procedure for the investigation and resolution of grievances. The procedures
536 hereinafter set forth shall be the sole and exclusive method of resolving the grievances of
537 employees covered by this Agreement.

538 11.2 Resort to Other Procedures. If prior to seeking resolution of a dispute by filing a
539 grievance hereunder, or while the grievance proceeding is in progress, an employee or UFF-
540 USF-GAU seeks resolution of the matter in any other forum, whether administrative or judicial,
541 the employer shall have no obligation to entertain or proceed further with the matter pursuant
542 to this grievance procedure. Further, since the University and the UFF-USF-GAU do not
543 intend that this grievance procedure be a device for appellate review, the University's
544 response to a recommendation of a hearing officer or other individual or group having
545 appropriate jurisdiction in any other procedure shall not be an act or omission giving rise to a
546 grievance under this procedure.

547 11.3 Definitions. As used herein:

548 A. The term "grievance" shall mean a dispute concerning the interpretation or
549 application of a specific term or provision of this Agreement, filed pursuant to this
550 Article, and subject to those exclusions appearing in other Articles of this Agreement.

551 ¹_{SEP}B. The term "grievant" shall mean an employee covered by this Agreement, or group
552 of such employees, who has filed a grievance in a dispute over a provision of this
553 Agreement which confers rights upon them, or UFF-USF-GAU which has filed a
554 grievance in a dispute over a provision of this Agreement that confers rights upon
555 UFF-USF-GAU. A grievance filed by UFF-USF-GAU which alleges a violation of its
556 rights by two (2) or more colleges, or a grievance filed by employees in two (2) or more
557 colleges, shall be initiated at Step 1.

558 11.4 Representation. UFF-USF-GAU shall have the exclusive right to represent any
559 employee in grievances filed hereunder, provided employees may represent themselves or
560 be represented by legal counsel. If an employee elects not to be represented by UFF-USF-
561 GAU, the University shall promptly inform UFF-USF-GAU in writing of the grievance. No
562 resolution of any individually processed grievance shall be inconsistent with the terms of this
563 Agreement and for this purpose UFF-USF-GAU shall have the right to have an observer
564 present at all meetings called between grievants and the University for the purpose of
565 discussing such grievances and shall be sent copies of all decisions at the same time they
566 are sent to the other participants.

567 11.5 Grievance Representatives. UFF-USF-GAU shall furnish annually to the University a list
568 of all persons authorized to act as grievance representatives no later than August 7th each
569 year and shall update the list as needed. The UFF-USF-GAU grievance representative shall
570 have the responsibility to meet all instructional, research, and other duties and responsibilities
571 incidental to the assigned workload. Some of these activities are scheduled to be performed
572 at particular times. Such representative shall have the right, during times outside of the hours
573 scheduled for these activities, to investigate, consult, and prepare grievance presentations
574 and attend grievance meetings. Should any hearings or meetings with the University, the
575 President, the Board, or their representatives necessitate rescheduling of assigned duties,
576 the representative may, with the approval of the appropriate administrator, arrange for the
577 rescheduling of such duties or their coverage by colleagues. Such approval shall not be
578 unreasonably withheld.

579 11.6 Appearances.

580 A. When an employee participates during working hours in arbitration proceedings or
581 in a grievance meeting between the grievant or representative and the President or
582 representative, that employee's compensation shall neither be reduced nor increased
583 for time spent in those activities.

584 B. Prior to participation in any such proceedings, conferences, or meetings, the
585 employee shall make arrangements acceptable to the appropriate supervisor for the
586 performance of the employee's duties. Approval of such arrangements shall not be
587 unreasonably withheld. Time spent in such activities outside regular working hours
588 shall not be counted as time worked.

589 11.7 Grievance Forms. All written grievances, requests for review, and arbitration notices
590 must be submitted in writing on forms attached to this Agreement as Appendices C, D, and
591 E respectively, and shall be signed by the grievant either in writing or through a verified digital
592 signature service. Except for the initial filing of the grievance, if there is difficulty in meeting
593 any time limit, the UFF-USF- GAU representative may sign such documents for the grievant.

594 The University may refuse consideration of a grievance not filed in accordance with this
595 Article.

596 Formal Grievance Procedure

597 11.8 Filing. The filing of a written grievance shall constitute a waiver of any rights the grievant
598 may have under Chapter 120, Florida Statutes, or under any University procedures with
599 regard to the matters contained in the grievance. A grievance may be withdrawn at any time
600 by the grievant or by the UFF-USF-GAU representative.

601 11.9 Step 1.

602 A. An employee having a dispute concerning the interpretation or application of a
603 specific term or provision of this Agreement may, within thirty (30) days following the
604 act or omission giving rise thereto, or the date on which the employee knew or
605 reasonably should have known of such act or omission, whichever is later, may file a
606 written grievance, on the form contained in Appendix C. The form shall be filed with
607 the Office of the Provost. All Step 1 grievances shall immediately proceed to an
608 informal resolution process unless both parties agree otherwise. The informal
609 resolution process shall last thirty (30) days and may be extended by mutual consent
610 of both parties. Following the initial period of informal resolution, the grievance will be
611 assumed to be resolved to the grievant's satisfaction if the grievant does not request,
612 in writing, a Step 1 decision within seven (7) days of the end of the informal resolution
613 period. If any extension of the informal resolution period expires without the grievant's
614 request for a Step 1 decision, the grievance will be assumed to have been resolved to
615 the grievant's satisfaction.

616 B. At any point in the informal resolution period the grievant may request a Step 1
617 meeting. If such request occurs during the initial period of informal resolution, the
618 University may accept the request or continue the informal resolution period for the
619 initial thirty (30) days, at which point the provisions of Article 11.9 (A) shall prevail. If
620 the request occurs during an extension of the informal resolution period the University
621 shall comply within fifteen (15) days. In advance of the Step 1 meeting, the grievant
622 shall have the right, upon request, to a copy of any identifiable and currently existing
623 documents relevant to the grievance, except documents protected by law. Documents
624 which are available electronically may be provided by electronic mail or by advising
625 the grievant of the web address for obtaining such documents.

626 C. At the Step 1 meeting, the grievant shall have the right to present any evidence in
627 support of the grievance. The University Step 1 representative shall meet with the
628 grievant and/or the grievant's representative no later than fifteen (15) days following
629 the filing of the grievance at Step 1 and shall issue a written decision to the grievant
630 and the grievant's representative, if any, within thirty (30) days following the meeting.

631 11.10 Step 2.

632 A. If the grievance has not been satisfactorily resolved at Step 1, the grievant may, on
633 the form contained in Appendix D, file a request for review with the Provost or
634 representative within fifteen (15) days following the receipt of the Step 1 decision. The

635 request shall include a copy of the grievance form filed at Step 1 and all written
636 responses and documents in support of the grievance filed at Step 1 and a copy of the
637 Step 1 decision. No additional allegations of violations may be introduced at Step 2.

638 B. The Provost or representative shall schedule a meeting with the UFF-USF- GAU
639 grievance representative within fifteen (15) days after the filing of the grievance and
640 shall issue a written decision to the grievant and the grievant's representative, if any,
641 within thirty (30) days following the meeting.

642 11.11 Step 3. If the grievance has not been satisfactorily resolved at Step 2, UFF-USF- GAU
643 may, upon the request of the grievant, proceed to arbitration by filing a written notice of intent
644 to do so on a form contained in Appendix E. Notice of intent to proceed to arbitration must be
645 filed with the Office of the General Counsel within thirty (30) days after receipt of the Step 2
646 decision and shall be signed by the grievant and the UFF- USF-GAU President or
647 representative.

648 11.12 Selection of Arbitrator. Representatives of the University and UFF-USF-GAU shall
649 meet within ninety (90) days after the execution of this Agreement for the purpose of selecting
650 a five (5) member Arbitration Panel. Within fifteen (15) days after receipt of a Notice of
651 Arbitration, representatives of the University and UFF-USF-GAU shall meet for the purpose
652 of selecting an arbitrator from the Panel. Selection shall be by mutual agreement or by
653 alternately striking names from the Arbitration Panel list until one (1) name remains. The
654 winner of a coin toss shall be the first to strike a name from the list. If the University and the
655 UFF-USF-GAU are unable to agree on a panel of arbitrators, they shall follow the normal
656 American Arbitration Association procedure for the selection of an arbitrator. The University
657 and the UFF-USF-GAU may mutually select as the arbitrator an individual who is not a
658 member of the Arbitration Panel. The arbitration shall be concluded within ninety (90) days
659 following the selection of the arbitrator.

660 11.13 Authority of the Arbitrator.

661 A. The arbitrator shall neither add to, subtract from, modify, nor alter the terms or
662 provisions of this Agreement. The arbitration decision shall be confined solely to the
663 application and/or interpretation of this Agreement and the precise issue(s) submitted
664 for arbitration. The arbitrator shall have no authority to determine any other issue. The
665 arbitrator shall refrain from issuing any statements of opinion or conclusions not
666 essential to the determination of the issues submitted.

667 B. If a supervisor has made a judgment involving the exercise of discretion, such as
668 decisions regarding evaluation, the arbitrator shall not substitute the arbitrator's
669 judgment for that of the supervisor, nor shall the arbitrator review such decision except
670 for the purpose of determining whether the decision has violated this Agreement.

671 C. If the arbitrator determines that the Agreement has been violated, the arbitrator
672 shall direct the University to take appropriate action. An arbitrator may award back pay
673 if the arbitrator determines that the employee is not receiving the appropriate
674 compensation from the University, but the arbitrator may not award other monetary
675 damages or penalties.

676 D. If notice that further employment will not be offered is not given on time, the
677 arbitrator may direct the University to renew the appointment only upon a finding that
678 no other remedy is adequate, and that the notice was given so late that (1) the
679 employee was deprived of reasonable opportunity to seek other employment, or (2)
680 the employee actually rejected an offer of comparable employment that the employee
681 otherwise would have accepted.

682 11.14 Burden of Proof. In all grievances except disciplinary grievances, the burden of proof
683 shall be on the employee. In disciplinary grievances, the burden of proof shall be on the
684 University.

685 11.15 Arbitrability. In any proceeding, the first matter to be decided is the arbitrator's
686 jurisdiction to act, which decision the arbitrator shall announce. Upon concluding that the
687 arbitrator has no such power, the arbitrator shall make no decision or recommendation as to
688 the merits of the grievance. Upon concluding that the issue is arbitrable, the arbitrator shall
689 normally proceed with the hearing at that time, provided that either the University or the UFF-
690 USF-GAU may seek judicial review of the arbitrator's decision as to jurisdiction and have the
691 hearing on the merits of the grievance delayed until such review is completed, pursuant to
692 Section 682.03, Florida Statutes.

693 11.16 Conduct of Hearing.

694 A. The arbitrator shall hold the hearing in Tampa, Florida, unless otherwise agreed by
695 the University and the UFF-USF-GAU. The hearing shall commence within sixty (60)
696 days of the arbitrator's acceptance of selection or as soon thereafter as is practicable,
697 and the arbitrator shall issue the decision within forty- five (45) days of the close of the
698 hearing or the submission of briefs, whichever is later, unless additional time is agreed
699 to by the University and the UFF-USF- GAU.

700 B. The decision shall be in writing and shall set forth findings of fact, reasoning, and
701 conclusions on the issues submitted. Except as expressly specified in this Article, the
702 provisions of the Florida Arbitration Code, Chapter 682, Florida Statutes, shall not
703 apply. Except as modified by the provisions of this Agreement or by other agreement
704 of the University and the UFF-USF-GAU, arbitration proceedings shall be conducted
705 in accordance with the rules and procedures of the American Arbitration Association.

706 11.17 Effect of Decision. The decision or award of the arbitrator shall be final and binding
707 upon the University , UFF-USF-GAU, and the grievant, provided that either the University or
708 the UFF-USF-GAU may appeal to an appropriate court of law a decision that was rendered
709 by the arbitrator acting outside of or beyond the arbitrator's jurisdiction, pursuant to Section
710 682, Florida Statutes.

711 11.18 Fees and Expenses. All fees and expenses of the arbitrator shall be divided equally
712 between the University and the UFF-USF-GAU. Each party shall bear the cost of preparing
713 and presenting its own case. The party desiring a transcript of the arbitration proceedings
714 shall provide written notice to the other party of its intention to have a transcript of the
715 arbitration made at least one (1) week prior to the date of the arbitration. The party desiring
716 such transcript shall be responsible for scheduling a stenotype reporter to record the
717 proceedings. The University and the UFF-USF-GAU shall share equally the appearance fee

718 of the stenotype reporter and the cost of obtaining an original transcript and one (1) copy for
719 the party originally requesting a transcript of the proceedings. The requesting party shall, at
720 its expense, photocopy the copy of the transcript received from the reporter and deliver the
721 photocopy to the other party within five (5) days after receiving the copy of the transcript from
722 the reporter.

723 11.19 Time Limits. All time limits contained in this Article may be extended by written mutual
724 agreement of the University and the UFF-USF-GAU, except the time limits for the initial filing
725 of a grievance. Upon failure of the University to provide a decision within the time limits
726 provided in this Article, the grievant or UFF-USF-GAU, where appropriate, may appeal to the
727 next step, provided that the appeal is filed at the next step within fifteen (15) days from the
728 date the prior step decision was due. Upon the failure of the grievant or UFF-USF-GAU,
729 where appropriate, to file an appeal within the time limits provided in this Article, the grievance
730 shall be deemed to have been resolved by the decision at the prior step.

731 11.20 Notification. All grievances, requests for review, notices, and decisions shall be
732 transmitted in person or by certified or registered mail, restricted delivery, return receipt
733 requested. In the event of a question as to the timeliness of any grievance, request for review,
734 notice, or decision, the date of receipt executed by the office receiving the grievance, request
735 for review, notice, or decision; or the date of mailing as determined by the postmark shall be
736 determinative. In the event that any action falls due on a day when the University is closed
737 for normal business, the action will be considered timely if it is accomplished by 5:00 p.m. on
738 the following business day.

739 11.21 Precedent. No complaint informally resolved or grievance resolved prior to arbitration
740 shall constitute a precedent for any purpose unless agreed to in writing by the University and
741 UFF-USF-GAU.

742 11.22 Retroactivity. An arbitrator's award may or may not be retroactive as the equities of
743 each case may demand, but in no case shall an award be retroactive to a date earlier than
744 thirty-five (35) days prior to the date the grievance was initially filed in accordance with this
745 Article or the date on which the act or omission occurred, whichever is later.

746 11.23 Processing. The filing or pendency of any grievance, or of arbitration proceedings,
747 under this Article shall not operate to impede, preclude, or delay the University from taking
748 the action complained of. Reasonable efforts, including the shortening of time limits when
749 practical, shall be made to conclude the processing of a grievance prior to the expiration of
750 the grievant's employment, whether by termination or failure to reappoint. In no event shall
751 any employee, as a result of a pending grievance, receive compensation following cessation
752 of employment.

753 11.24 Reprisal. No reprisal of any kind will be made by the University, UFF-USF-GAU or their
754 representatives against any grievant, any witness, any UFF-USF-GAU representative, or any
755 other participant in the grievance procedure by reason of such participation.

756 11.25 Records. All written materials pertinent to a grievance shall be filed separately from the
757 evaluation file of the grievant or witnesses, except decisions resulting from arbitration or
758 settlement.

759

Article 12

760

Matriculation and Tuition Payment Program

761 12.1 Intent. Payment by the University of matriculation fees for graduate assistants and non-
762 resident tuition charges for all out-of-state graduate assistants, which results in those
763 employees not paying such charges is highly desirable in order to attract high quality graduate
764 students to the University and to improve the quality of education therein.

765 12.2 Tuition Payment Program.

766 A. The University and the UFF-USF-GAU will continue to seek legislative funding to
767 meet the costs associated with the matriculation and tuition payment program. A
768 graduate assistant appointment shall result in eligibility for the tuition payment
769 program. Tuition payment shall be for at least the minimum number of credit hours
770 necessary to maintain the graduate assistantship. If sufficient funds are not available
771 to provide all graduate assistants with such tuition payment, first consideration for
772 receipt of these payments shall be given to graduate assistants who are employed for
773 .25 FTE or more for at least one semester during the prior academic year and who are
774 students in good standing.

775 B. In order to supplement the funding provided by the Legislature for this program and
776 following the practice of other major research institutions throughout the country, the
777 University shall encourage those individuals who make application for contracts or
778 grants to incorporate the costs of the matriculation and tuition charges which are
779 associated with graduate assistants who are to be supported by such contract or grant
780 into the contract or grant proposal.

781 12.3 Right to Request Information. The GAU shall have the right to request information
782 provided in Chapter 447, Part 2, Florida Statutes, titled Labor Organizations, Public
783 Employees.

784 12.4 Notice for Tuition Waivers.

785

786 A. Fall Tuition Waivers. Employees serving in at least one (1) semester appointment
787 during the Fall academic term shall be provided with a notice of tuition waiver by July 1.

788 B. Spring Appointments. Employees who will be offered an appointment to
789 commence at the start of the Spring semester shall be provided with a notice of tuition waiver
790 by November 30.

791 12.5 Tuition and Fee Deferral. In order to minimize the financial burden on Graduate
792 Assistants:

793 A. The Office of Financial Aid will arrange for all Graduate Assistants to have their
794 tuition and fees deferred until the end of the 7th week of the semester. A tuition deferral
795 prevents cancellation of registration for non-payment of fees and temporarily prevents
796 assessment of the late payment fee.

797 B. Graduate Assistants will be subject to registration and transcript holds and other
798 requests until the tuition and fees are paid.

799 C. Any Graduate Assistants who continue to have a tuition or fee balance after the
800 7th week of the semester will be charged the \$100 Late Payment Fee but will be able to remain
801 in their coursework.

802 D. A Graduate Assistant who has financial aid cannot have the extended time to pay
803 fees. The USF Financial Aid Office pays all charges on a student account and if there is
804 funding remaining, refunds the balance to the student.

805 **Article 13**

806 **Reserved Rights**

807 13.1 Reservation of Rights. The University retains and reserves to itself all rights, powers,
808 and authority vested in it, whether exercised or not, including but not limited to the right to
809 plan, manage, and control the University and in all respects carry out the ordinary and
810 customary functions of management.

811 13.2 Limitations. All such rights, powers, and authority are retained by the University subject
812 only to those limitations expressly imposed by this Agreement. Only violations of such
813 limitations shall be subject to Article 11, Grievance Procedure.

814 **Article 14**

815 **Use of Facilities**

816 14.1 University Facilities. UFF-USF-GAU shall have the right to use University facilities for
817 meetings and all other services on the same basis as they are generally available to other
818 University-related organizations. University-related organizations are defined as follows:

819 University-related Groups and Organizations. Those groups and organizations may or may
820 not receive budgetary support. Examples of such groups include: student organizations,
821 honor societies, fraternities, sororities, alumni associations and faculty committees, career
822 service staff council, direct support organizations, The United Faculty of Florida, etc.

823 14.2 Bulletin Boards. UFF-USF-GAU may post bulletins and notices relevant to its position
824 as the collective bargaining representative of the employees on one (1) bulletin board in each
825 department in which employees work. The University shall notify the UFF- USF-GAU of the
826 location of said bulletin boards upon request. Materials placed on the designated bulletin
827 boards may not be used for election campaigns, for public office or for exclusive
828 representation campaigns. A copy of union-related postings will be provided to the Office of
829 the Graduate Dean simultaneous to the time of posting.

830 14.3 Office Space: The University will provide an office to UFF-USF-GAU.

831

832

833

Article 15

834

Union Deductions

835 15.1 Deductions. Pursuant to the provisions of Section 447.303, Florida Statutes, the
836 University and UFF-USF-GAU hereby agree to the deduction and remittance of UFF- USF-
837 GAU membership dues and uniform assessments.

838 15.2 Procedure. During the term of this Agreement, the University agrees to deduct UFF-
839 USF-GAU membership dues and uniform assessments, if any, in an amount established by
840 UFF-USF-GAU and certified in writing by the UFF-USF-GAU to the University, from the pay
841 of those employees in the bargaining unit who individually and voluntarily make such request
842 on a written dues deduction authorization form as provided herein, as follows:

843 A. Commencement of Deduction. Deductions will be made beginning with the first full
844 pay period following receipt of check-off authorization by the University before the
845 established processing deadline as noted in the Payroll Bi-Weekly Processing
846 Schedule.

847 B. UFF-USF-GAU shall give written notice to the University of any changes in its dues
848 at least forty-five (45) days prior to the effective date of any such change.

849 C. Remittance. The dues deducted shall be remitted by the University to the UFF-
850 USF-GAU within thirty (30) days following the end of the pay period. Accompanying
851 each remittance shall be a list of the employees from whose salaries such deductions
852 were made and the amounts deducted.

853 D. Termination of Deduction. The University's responsibility for deducting dues and
854 uniform assessments, if any, from an employee's salary shall terminate automatically
855 upon either (1) thirty (30) days written notice from the employee to the University
856 personnel office revoking that employee's prior dues deduction authorization, or (2)
857 the discontinuance of the authorizing employee's status within the bargaining unit. The
858 University shall provide a bi-weekly report of dues deductions containing the name
859 and employee identification of each employee and the amount of dues deducted.

860 15.3 Indemnification. UFF-USF-GAU assumes responsibility for: (1) all claims against the
861 University, including the cost of defending such actions, arising from their compliance with
862 this Article, and for (2) all monies deducted under this Article and remitted to UFF-USF-GAU.
863 UFF-USF-GAU shall promptly refund to the University excess monies received under this
864 Article.

865 15.4 Exceptions. The University will not deduct any UFF-USF-GAU fines, penalties, or special
866 assessments from the pay of any employee.

867

868

869

870 **Article 16**

871 **Deduction**

872 The University agrees to provide one (1) payroll deduction per employee per pay period for
873 the UFF-USF-GAU voluntary economic services programs. It is understood that all such
874 programs and deductions will meet requirements of State and Board rules and regulations.

875 **Article 17**

876 **Miscellaneous Provisions**

877 17.1 No Strike or Lockout. The University agrees that there will be no lockout at the University
878 during the term of this Agreement. UFF-USF-GAU agrees that there will be no strike by itself
879 or by any employees during the term of the Agreement.

880 17.2 Effect of Passage of Law. Any provision of this Agreement which is contrary to law, but
881 becomes legal during the term of this Agreement, shall take immediate effect upon the
882 enactment of such legislation.

883 17.3 Venue. For purposes of venue in any judicial review of an arbitrator's decision, the
884 parties elect to submit themselves to the jurisdiction of the courts in Hillsborough County,
885 Florida. In an action commenced in Hillsborough County, neither USF nor UFF- USF-GAU
886 will move for a change of venue based upon the defendant's residence in fact if other than
887 Hillsborough County.

888 17.4 Copies of Agreement. The Board agrees to make the Agreement available in electronic
889 format on its website within 30 days of ratification by both the UFF-USF-GAU and the Board.
890 The Union may notify its membership of the web location.

891 17.5 Class Titles. Whenever the University creates a new class for graduate assistant or
892 student employees, it shall designate such class as being either within or outside the
893 bargaining unit and shall notify UFF-USF-GAU. Further, if the University revises the
894 specifications of an existing class in the graduate assistant series so that its bargaining unit
895 designation is changed, it shall notify UFF-USF-GAU of such new designation. Within ten (10)
896 days following such notification, UFF-USF-GAU may request a meeting for the purpose of
897 discussing the designation. If, following such discussion, UFF-USF- GAU disagrees with the
898 designation, it may request the Florida Public Employees Relations Commission to resolve
899 the dispute through unit clarification proceedings. An employee may request a review of the
900 appropriateness of the employee's classification by the appropriate University office. The
901 matter shall not be subject to Article 11, Grievance Procedure.

902 17.6 A. Report to UFF-USF-GAU. The University shall provide the following reports to UFF-
903 USF-GAU:

904 (1) The University shall provide a report containing directory information, including
905 campus mail addresses and campus e-mail address if the GA has authorized the
906 University to release this information to the UFF-USF-GAU, by the third week of each
907 semester if practicable.

908 (2) Each semester, the University shall provide, upon request, the following reports
909 with no specific student identifiers:

910 a. GA Summary Report to include the following information:

- 911 (i) Class title/code
- 912 (ii) Hiring/academic department
- 913 (iii) Academic level (e.g., Doctoral, Master's)
- 914 (iv) Rate of pay
- 915 (v) FTE

916 b. Matriculation, tuition, and fee payment program report.

917 c. GA Health Insurance participant report.

918 (3) All reports shall be provided in an electronic, delimited format, such as Excel, where
919 practicable.

920 (4) UFF-USF-GAU agrees to pay reasonable costs associated with preparation of the
921 reports contained herein and in Article 17.6 B.

922 B Email addresses of graduate students shall be provided no later than the third week of
923 the semester, if practicable, to the local UFF-USF-GAU for all graduate students who have
924 affirmatively released this information pursuant to Article 2.1 (O).
925

926 17.7 Dissemination of Information. The University agrees to work with the UFF-USF-GAU to
927 disseminate information regarding contract management, labor-management relations and
928 other items of mutual interest. The Graduate School will make reasonable, good faith efforts
929 to provide to UFF-USF-GAU via email any information disseminated by any other means
930 other than email to every graduate student related to all issues concerning graduate assistant
931 employment or assignments.

932 **Article 18**

933 **Other Employee Rights**

934 18.1 Work Space. If the University requires that the assigned duties of an employee be
935 performed in a specific on-campus location, other than the computer center or the library, the
936 University shall provide space for such assignment. If practicable, space shall be provided
937 where private consultations with employee's students, if any, may be held. Before an
938 employee's work space location is changed, or before there is a substantial alteration to an
939 employee's work space to a degree that impedes the employee's work effectiveness, the
940 affected employee shall be notified.

941 18.2 Mail. Employees shall be entitled to receive employment-related and U.S. mail at their
942 work location. Each department or unit shall make available a convenient receptacle for
943 employees to receive such mail and shall notify each employee of its location. Where a
944 shared mail receptacle is used, graduate assistants should instruct their students to use
945 sealed envelopes for confidential correspondence.

946 18.3 Safe Conditions. The University shall make every reasonable effort to provide
947 employees a safe working environment. Employees are responsible for immediately reporting
948 situations involving unsafe working conditions to appropriate administrators. Appropriate
949 administrators include, but are not limited to, the employee's immediate supervisor, graduate
950 coordinator, department chair, Dean, or the Director of Environmental Health and Safety.
951 Whenever an employee reports a condition which the employee feels represents a violation
952 of safety or health rules and regulations or which is an unreasonable hazard to persons or
953 property, such conditions shall be promptly investigated. The appropriate administrator will
954 reply to the employee and in appropriate situations may notify other employees.

955 18.4 Limitation on Personal Liability. In the event an employee is sued for an act, event, or
956 omission which may fall within the scope of Section 768.28, Florida Statutes, the employee
957 should notify the Graduate Dean's office as soon as possible after receipt of the summons
958 commencing the action in order that the University may fulfill its obligation. Failure to notify
959 the employer promptly may affect the rights of the parties.

960 18.5 Access to Resources. The University shall provide employees access to office space,
961 desk space, telephone service, computers, storage space, office supplies, texts and/or
962 reading materials, photocopy services, fax services, and office, laboratory, studio, and/or
963 instructional equipment, for use in completing their assigned instructional or research
964 responsibilities.

965 18.6 Health Insurance Policy. The parties agree that accessible and affordable health
966 insurance for all graduate assistants is highly desirable in order to attract high quality graduate
967 students to the University. The University shall provide health insurance as agreed to in Article
968 23.2.

969 18.7 Health Insurance Committee. The UFF-USF-GAU President will appoint one (1)
970 employee to serve on the University's Student Health Insurance Committee.

971 18.8 Personnel Rules. Any personnel regulations or procedures not addressed in this
972 Agreement shall be addressed as provided in University regulations or procedures, provided
973 that nothing herein shall be construed to waive the various right to consultation or bargaining
974 as provided by law.

975 **Article 19**

976 **Totality of Agreement**

977 19.1 Limitation. The University and the UFF-USF-GAU acknowledge that during the
978 negotiations which resulted in this Agreement, UFF-USF-GAU had the unlimited right and
979 opportunity to present demands and proposals with respect to any and all matters lawfully
980 subject to collective bargaining, and that all of the understandings and agreements arrived at
981 thereby are set forth in this Agreement, and that it shall constitute the entire and sole
982 Agreement between the University and the UFF-USF-GAU for its duration.

983 19.2 No Obligation to Bargain. Therefore, the University and UFF-USF-GAU, during the term
984 of this Agreement, voluntarily and unqualifiedly waive the right, and agree that the other shall
985 not be obligated, to bargain collectively with respect to any subject or matter, whether or not

986 referred to or covered by this Agreement, even though such subject or matter may not have
987 been within the knowledge or contemplation of the University and the UFF-USF-GAU at the
988 time they negotiated or signed this Agreement.

989 19.3 Modifications. Nothing herein shall, however, preclude the University and the UFF-USF-
990 GAU from mutually agreeing to alter, amend, delete, enlarge, or modify any of the provisions
991 of this Agreement in writing.

992 **Article 20**

993 **Severability**

994 In the event that any provision of this Agreement (a) is found to be invalid or unenforceable
995 by final decision of tribunal of competent jurisdiction, or (b) is rendered invalid by reason of
996 subsequently enacted legislation, or (c) shall have the effect of a loss to the State of Florida,
997 the State University System, or the University funds, property, or services made available
998 through federal law or (d) pursuant to Section 447.309(3), Florida Statutes, can take effect
999 only upon the amendment of a law, rule or regulation and the governmental body having such
1000 amendatory powers fails to take appropriate legislative action, then that provision shall be of
1001 no force or effect, but the remainder of the Agreement shall continue in full force and effect.
1002 If a provision of this Agreement fails for reason (a), (b), or (c) above, the University and the
1003 UFF-USF-GAU shall enter into immediate negotiations for the purpose of arriving at a
1004 mutually satisfactory replacement for such provision.

1005 **Article 21**

1006 **Amendment and Duration**

1007 21.1 Duration. The Agreement shall become effective on the date of ratification by the Board
1008 of Trustees in 2022, and remain in effect through June 30, 2025. Negotiations for a successor
1009 agreement shall begin upon request of either party, but no later than February 28, 2025.

1010 21.2 Amendments. In the event the University and UFF-USF-GAU negotiate a mutually
1011 acceptable agreement, or memorandum of understanding, it shall be put in writing and
1012 become part of this Agreement upon ratification by both parties.

1013 21.3 Notice. Any notice sent pursuant to this Agreement shall be sent via email and/or
1014 certified mail.

1015 A. UFF-USF-GAU shall be contacted through on-campus address and email of the
1016 President and Bargaining Chair of the executive board of GAU.

1017 B. The University shall be contacted through on-campus address and email of the
1018 Associate Vice President of Human Resources or other designated representative.

1019

1020

1021

1022 **Article 22**

1023 **Definitions**

1024 22.1 Bargaining unit – means those employees, collectively, represented for collective
1025 bargaining purposes by UFF-USF-GAU pursuant to the certification of the Florida Public
1026 Employees Relations Commission.

1027 22.2 USF or University – means the University of South Florida, its Board of Trustees,
1028 President and staff.

1029 22.3 Days – means calendar days.

1030 22.4 Employee – means a member of the bargaining unit.

1031 22.5 Faculty supervisor – means the individual identified by the President or representative
1032 as having immediate administrative authority over bargaining unit employees.

1033 22.6 Graduate assistant – means a person employed in the bargaining unit.

1034 22.7 Outside Activity – means outside employment which interferes with the employee’s
1035 obligation to the University or which constitutes a conflict of interest.

1036 22.8 Titles and headings – the title of Articles and headings which precede text are inserted
1037 solely for convenience of reference and shall not be deemed to limit or affect the meaning,
1038 construction, or effects of any provision of this Agreement.

1039 22.9 UFF-USF-GAU – means United Faculty of Florida-Graduate Assistants United.

1040 **Article 23**

1041 **Stipends**

1042 23.1 Minimum Stipend. The minimum stipend shall be as follows:

1043 A. Effective beginning with the Fall 2022 Semester, or no later than six (6) weeks after
1044 ratification by the Board of Trustees, whichever is later, for students at the masters
1045 level, each nine-month employee (19.5 pay periods) on a .50 FTE appointment shall
1046 be guaranteed a minimum stipend of \$13,750. Appointments greater or less than .50
1047 FTE shall be paid at a stipend rate representing a proportion of this minimum as
1048 determined by the fractional FTE appointment and the budgeted weeks of activity.

1049 B. Effective beginning with the Fall 2022 Semester, or no later than six (6) weeks after
1050 ratification by the Board of Trustees, whichever is later, for students at the doctoral
1051 level, each nine-month employee (19.5 pay periods) on a .50 FTE appointment shall
1052 be guaranteed a minimum of \$19,613. Appointments greater or less than .50 FTE but
1053 no less than .25 FTE shall be paid at a stipend rate representing a proportion of this
1054 minimum as determined by the fractional FTE appointment and the budgeted weeks
1055 of activity.

1056 C. Effective beginning with the Fall 2023 Semester: for students at the masters
1057 level, each nine-month employee (19.5 pay periods) on a .50 FTE appointment shall
1058 be guaranteed a minimum of \$14,575. Appointments greater or less than .50 FTE,
1059 but no less than .25 FTE shall be paid at a stipend rate representing a proportion of
1060 this minimum as determined by the fractural FTE appointment and the budgeted
1061 weeks of activity.

1062 D. Effective beginning with the Fall 2023 Semester: for students at the doctoral
1063 level, each nine-month employee (19.5 pay periods) on a .50 FTE appointment shall
1064 be guaranteed a minimum of \$20,594. Appointments greater or less than .50 FTE,
1065 but no less than .25 FTE shall be paid at a stipend rate representing a proportion of
1066 this minimum as determined by the fractural FTE appointment and the budgeted
1067 weeks of activity.

1068 E. Effective beginning with the Fall 2024 Semester: for students at the masters
1069 level, each nine-month employee (19.5 pay periods) on a .50 FTE appointment shall
1070 be guaranteed a minimum of \$15,304. Appointments greater or less than .50 FTE,
1071 but no less than .25 FTE shall be paid at a stipend rate representing a proportion of
1072 this minimum as determined by the fractural FTE appointment and the budgeted
1073 weeks of activity.

1074 F. Effective beginning with the Fall 2024 Semester: for students at the doctoral
1075 level, each nine-month employee (19.5 pay periods) on a .50 FTE appointment shall
1076 be guaranteed a minimum of \$21,624. Appointments greater or less than .50 FTE,
1077 but no less than .25 FTE shall be paid at a stipend rate representing a proportion of
1078 this minimum as determined by the fractural FTE appointment and the budgeted
1079 weeks of activity.

1080 23. 2 Employer's Contribution to Health Insurance.

1081 A. With an effective date beginning with the Fall 2016 semester, the University agrees
1082 to continue to pay the health insurance premium up to a maximum \$2,410 annual
1083 amount plus 1% above the consumer price index as published by the Bureau of Labor
1084 Statistics of the United States Department of Labor on the preceding July 1 for
1085 graduate assistants appointed at .25 FTE or greater who elect coverage under the
1086 USF Student Health Insurance Plan.

1087 As an exception to the above maximum contribution level, effective August 1, 2022 to July 31,
1088 2025, the University agrees to pay the health insurance premiums up to a maximum annualized
1089 amount of \$2,762 for each graduate assistant appointed at .25 FTE or greater who elects
1090 individual coverage under the USF Student Health Insurance Plan during said period. .

1091 B. Payment of the employer contribution will be discontinued or reduced as applicable
1092 under the following circumstances:

- 1093 (1) cessation of the appointment; or
1094 (2) reduction of the appointment to less than .25 FTE, as applicable;
1095 (3) completion of the hours specified for completion of the degree requirements
1096 of the program in which the employee is enrolled; or

1097 (4) failure of the employee to pay the employee portion of the insurance
1098 premium when due;
1099 (5) such is required by the Affordable Care Act (“ACA”)^{1**}.
1100

1101 23.3 Departmental Discretion to Provide Stipend Increases. Nothing contained herein shall
1102 prevent departments from paying stipends higher than the minimum specified nor prevent the
1103 University to review market data to determine if increased funding for GA stipends to a
1104 specific department(s) or unit(s) supports market competitiveness. Any such increase in
1105 funding to a department or unit is at the sole discretion of the University, which shall retain
1106 this authority for the duration of this Agreement and which will further continue upon its
1107 expiration. The University will issue a report or other appropriate notification to UFF-USF-
1108 GAU on a quarterly basis indicating the departments or units, if any, that received additional
1109 funding levels provided to increase market competitiveness, and not regularly budgeted
1110 amounts paid for GA stipends. Increased funding for GA stipends under this paragraph is not
1111 subject to Article II, Grievance Procedure and Arbitration.

1112 23.4 Initial Payment. Employees who have turned in paperwork in a timely manner shall
1113 receive their first paycheck not later than four (4) weeks after the first day of the term of their
1114 contract. In the case of administrative error by the University and the employee is not paid on
1115 time, the University shall make a reasonable effort to provide the paycheck to the employee
1116 within one (1) week of notification of the error.

1117 23.5
1118 A. The minimum stipend increases contained in Section 23.1 are contingent upon no
1119 reduction in the University’s Performance Based Funding (“PBF”) as compared to the
1120 level of PBF on August 1, 2016. To avoid confusion, the PBF Model was approved at
1121 the January 2014 Board of Governors Meeting. The model includes 10 metrics that
1122 evaluate Florida institutions on a range of issues. PBF levels will be calculated on
1123 August 1 in each year of the contract for the purposes of determining if there was a
1124 reduction in PBF.

1125
1126 B. In the event of a reduction in PBF funding the University shall have the sole
1127 discretion to determine whether to proceed with the increases described in this article.
1128 In the event the University does not proceed with the increases due to reduction in
1129 PBF, the University will notify GAU in writing of its decision (“Notice”). Within 30 (thirty)
1130 days of the University’s Notice, the parties will meet to bargain in good faith for an
1131 alternate salary article.
1132

1133 **Article 24**

1134 **Consultation**

1135 24.1 Consultation. The Graduate Dean shall meet with the UFF-USF-GAU Chapter
1136 representatives to discuss matters pertinent to the implementation or administration of this
1137 Agreement, University actions affecting terms and conditions of employment unique to the

** Note: The parties agree to reopen this provision upon the request of a party if contributions by the University are not permitted.

1138 University, or any other mutually agreeable matters. Such meetings shall occur once (1) per
1139 Fall semester and once (1) per Spring semester, unless the parties agree otherwise. The
1140 party requesting consultation shall submit a written list of agenda items in advance of the
1141 meeting if it wishes to discuss specific issues.

1142 24.2 Special Consultation. The UFF-USF-GAU may request a special consultation with the
1143 University to discuss enforcement of specific provisions of this Agreement or issues related
1144 to the administration of the Agreement. Such requests for special consultation shall not be
1145 unreasonably denied.

1146 24.3 The parties understand and agree that such meetings held pursuant to Article 24.1 or
1147 24.2 shall not constitute or be used for the purpose of collective bargaining.

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Appendix A

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Reserved

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Appendix B

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Dues Check-off Authorization Form Graduate Assistants Bargaining Unit

1171 I authorize the University of South Florida, to deduct from my pay, starting with the first full
1172 pay period commencing not earlier than seven (7) days from the date this authorization is
1173 received by the University, membership dues and uniform assessments of the United Faculty
1174 of Florida in such amount as may be established from time to time in accordance with the
1175 constitution and bylaws of the UFF-USF-GAU and certified in writing to the University by the
1176 UFF-USF-GAU, and I direct that sum or sums so deducted be paid over to the UFF-USF-
1177 GAU.

1178 Dues payments to UFF-USF-GAU are not tax deductible as charitable contributions for
1179 Federal income tax purposes. However, they may be tax deductible under other provisions
1180 of the Internal Revenue Code.

1181 This authorization shall continue until either (1) revoked by me at any time upon thirty (30)
1182 days written notice to the University Human Resources Office, or (2) the discontinuance of
1183 my status within this bargaining unit.

1184 _____
1185 Date Employee's Signature

1186 _____
1187 Employee ID # Name – printed
1188

1189 _____
1190 Department University
1191

1192 Effective date if later than above: _____

1193 Please return to your UFF-USF-GAU Chapter Treasurer or the UFF State Office, United
1194 Faculty of Florida, 306 East Park Avenue, Tallahassee, FL 32301.

1195

1196

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1203

Membership Form

1204

Graduate Assistant Bargaining Unit United Faculty of Florida (UFF-USF-GAU)

1205

Please PRINT complete information where necessary.

1206

Mr. Ms. Mrs. Dr.

1207

Employee ID #

1208

1209

University

1210

1211

1212

1213

Last Name

First Name

MI

1214

1215

1216

Home Address

Campus Address

1217

1218

1219

Street

Department

Bldg/Room #

1220

1221

1222

City

State

Zip Code

1223

1224

Please enroll me as a member of the United Faculty of Florida (UFF-USF-GAU).

1225

1226

1227

All UFF-USF-GAU members are also members of the Florida Education Association, National Education Association, American Federation of Teachers and the AFL-CIO at no additional cost.

1228

1229

UFF-USF-GAU dues are 1 percent of regular salary for members for which the United Faculty of Florida is the bargaining agent.

1230

1231

1232

Dues payments to UFF-USF-GAU are not tax deductible as charitable contributions for Federal income tax purposes. However, they may be tax deductible under other provisions of the Internal Revenue Code.

1233

1234

1235

Signature of member

Date

1236

1237

1238

Return your completed membership form to your local UFF-USF-GAU Chapter Treasurer or the UFF State office, United Faculty of Florida, 306 East Park Avenue, Tallahassee, FL 32301.

1239

United Faculty of Florida UFF-USF-GAU UFF PAC

1240

Payroll Deduction Authorization Form

1241 I authorize the University of South Florida to deduct from my pay, starting with the first full
1242 biweekly pay period commencing not earlier than seven (7) days from the date this
1243 authorization is received by the University, contributions to the UFF Political Action
1244 Committee in the amount of \$1.00 per pay period, and I direct that the sum so deducted be
1245 paid over to the UFF-USF-GAU.

1246 Contributions or gifts to UFF PAC are not tax deductible as charitable contributions for
1247 Federal income tax purposes. However, they may be tax deductible under other provisions
1248 of the Internal Revenue Code.

1249 The above deduction authorization shall continue until either (1) revoked by me at any time
1250 upon thirty (30) days written notice to the University Human Resources Office and to the UFF-
1251 USF-GAU, or (2) my transfer or promotion out of this bargaining unit.

1252 _____
1253 Signature of member Date

1254 _____
1255 Last Name First Name MI

1256 _____
1257 Department

1258 _____
1259 Employee ID #

1260 Effective date if later than above: _____
1261

1262 Return to your local UFF-USF-GAU Chapter Treasurer or the UFF State office, United Faculty
1263 of Florida, 306 East Park Avenue, Tallahassee, FL 32301.

1264 **UFF PAC Form**

1265 Please PRINT complete information where necessary.

1266 Mr. Ms. Mrs. Dr. _____
1267 Employee ID #

1268 _____
1269 University of South Florida

1270 _____
1271 Last Name First Name MI

1272 _____
1273 Home Address Campus Address
1274

1275

1276

1277 Street _____ Department _____ Bldg/Room # _____

1278

1279

1280 City _____ State _____ Zip Code _____

1281

1282

1283 Congressional District _____

1284 Race _____ Sex _____ Birthdate _____

1285 Please enroll me as a member of the United Faculty of Florida Political Action Committee.
1286 UFF PAC contributions are not tax deductible as charitable contributions for Federal income
1287 tax purposes. However, they may be tax deductible under other provisions of the Internal
1288 Revenue Code.

1289

1290 Signature of member _____ Date _____

1291

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1300 **Appendix C**

1301 **Grievance**

1302 I. Grievant Name: _____

1303 University: _____

1304 College: _____

1305 DEPT : _____

1306 Office Phone: _____

1307 Step I Grievance Representative

1308 Name: _____

1309 Mailing Address: _____

1310 Office Phone: _____

1311

1312 If grievant is represented by UFF-USF-GAU or legal counsel, all University communications
1313 should go to the grievant's representative as well as the grievant.

1314 Other address to which University mailings pertaining to grievance shall be sent:

1315 _____

1316 _____

1317 II. Grievance^[SEP] Provisions of Agreement allegedly violated (specify Articles and Sections):

1318 _____

1319 _____

1320 _____

1321 Statement of grievance (must include date of acts or omissions complained of):

1322 _____

1323 _____

1324 _____

1325

1326 Remedy sought:
1327 _____
1328 _____
1329 _____

1330

1331 III. Authorization

1332 I will be represented in this grievance by: (check one – representative must sign on
1333 appropriate line):

1334 _____UFF-USF-GAU_____

1335 _____Legal Counsel_____

1336 _____Myself_____

1337 I UNDERSTAND AND AGREE THAT BY FILING THIS GRIEVANCE, I WAIVE WHATEVER
1338 RIGHTS I MAY HAVE UNDER CHAPTER 120 OF THE FLORIDA STATUTES WITH
1339 REGARD TO THE MATTERS I HAVE RAISED HEREIN AND UNDER ALL OTHER
1340 UNIVERSITY PROCEDURES WHICH MAY BE AVAILABLE TO ADDRESS THESE
1341 MATTERS.

1342 This grievance was filed with the Associate Provost and Dean of the Graduate Dean on
1343 _____, by (check one)

1344 _____mail (certified or registered; restricted delivery; return receipt requested);

1345 _____personal delivery.

1346

1347 _____
1348 Signature of Grievant (Grievant must sign if grievance is to be processed.)
1349

1350 Date received by the Associate Provost and Dean of the Graduate
1351 School:_____

1352 Copies of the Step 1 Decision shall be sent to:

- 1353 Grievant
- 1354 Step 1 Representative
- 1355 Faculty Supervisor
- 1356

1357

Appendix D

1358

Request for Review of Step 1 Decision

1359 I. Grievant Name: _____

1360 Office Address: _____

1361 Step I Representative Name: _____

1362 Mailing Address: _____

1363 Date of Step 1 Decision: _____

1364 Provisions of Agreement allegedly violated (as specified at Step 1):

1365 _____

1366 I hereby request that the Provost or representative review the attached decision made in
1367 connection with the attached grievance because:

1368 Grievant received decision on _____, and filed his request to review with the
1369 Provost's office _____, by (check one):

1370 _____mail (certified or registered; restricted delivery; return receipt requested);

1371 _____personal delivery.

1372 Date of Receipt by Provost's Office: _____

1373 _____

1374 Signature of Grievant

1375

1376 I am represented in this grievance by (check one – representative should sign on appropriate
1377 line):

1378 _____UFF-USF-GAU_____

1379 _____Legal Counsel_____

1380 _____Myself_____

1381 A copy of the following documents must be attached to this Request at the time of its filing
1382 with the Provost:

- 1383 1. Appendix C – Original grievance form filed with the University.
- 1384 2. Step 1 Decision, if issued by the University.
- 1385 3. All attachments to the Decision, as required in Articles 11.9 and 11.10.
- 1386

1387 This Request should be sent to: Office of Provost ADM 226

1388 Copies of Step 2 Decision shall be sent to:

1389 Grievant
1390 Step 1 Representative
1391 Step 1 Reviewer
1392

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Appendix E

1415

Notice of Arbitration

1416 The United Faculty of Florida hereby gives notice of its intent to proceed to arbitration in
1417 connection with the decision of the Provost's office dated _____ and
1418 received by the UFF State Office on _____ in this grievance of:

1419 Name: _____

1420 USF FILE NO: _____^[SEP]The following statement of issue(s)
1421 before the Arbitrator is proposed:

1422 The notice was filed with the Office of the General Counsel on _____ by (check one):

1423 _____ Mail (certified or registered, restricted delivery, return receipt requested);

1424 _____ Personal delivery.^[SEP]

1425 Date of receipt by the Office of the General Counsel: _____

1426

1427 _____

1428 Signature of UFF President or Director of Arbitrations

1429 I hereby authorize UFF to proceed to arbitration with my grievance. I also authorize UFF and
1430 the University of South Florida or its representatives to use, during the arbitration
1431 proceedings, copies of any materials in my evaluation file pertinent to this grievance and to
1432 furnish copies of the same to the arbitrator.

1433

1434 _____

1435 Signature of Grievant

1436 This notice should be sent to: Office of the General Counsel ADM 250

1437

1438

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Appendix F

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1445 In those circumstances when formal offer letters are made, the following Notice is applicable should
1446 the reappointment be delayed.

1447

1448 Date

1449

1450 To Those It May Concern,

1451

1452 Confirmation of a formal offer of employment for some graduate appointments have been delayed
1453 beyond the Notice of Reappointment date of (April 30 / June 30) specified in Article 2.4 D of the CBA
1454 between USF and UFF-USF-GAU. We are working to resolve this in a timely manner. It is expected
1455 that a decision regarding your formal letter of offer will be processed and submitted to you for review
1456 by _____Expected Date_____’ however, unforeseen circumstances may delay this further, in which
1457 case an updated notice will be sent out instead. Note that any offered appointment will be contingent
1458 upon the submission of required documentation of employability. Any offer may also be contingent
1459 upon the successful completion of a satisfactory criminal history background check, consistent with
1460 USF policies. This letter does not guarantee the receipt of a formal offer of employment.

1461

1462 Sincerely,

1463

1464 Email Signature Date

1465

1466

1467

1468 IN WITNESS THEREOF, the parties have set their signatures this ____ day of
1469 _____, 2022.

1470

1471

1472 FOR THE UNIVERSITY OF SOUTH
1473 FLORIDA BOARD OF TRUSTEES

FOR UNITED FACULTY OF FLORIDA/
GRADUATE ASSISTANTS UNITED

1474

1475

1476

1477

1478

1479 _____
Rhea Law
1480 President

Sam Badger
UFF-USF-GAU

1481

1482

1483

1484

1485

1486 _____
John F. Dickinson
1487 Chief Negotiator

UFF-USF-GAU

1488

1489

1490 Jim Garey
1491 Liz Gierbolini
1492 Olga Joanow
1493 Sheri Neshiem
1494 Ruth Bahr
1495