



A Framework for Strategic Planning (2013–2018)

Joel Seligman
Report to the Faculty Senate
April 23, 2013

College Town



College Admissions Data

Admission Year:	2005	2009	2011	2012	2013
Applicants	11,293	12,111	13,672	14,786	16,119
Enrolled High School GPA	3.56	3.72	3.81	3.81	3.80
Enrolled Two-score SAT	1304	1330	1344	1358	1369

Gail Norris



Kathy Rideout



Eric Fredericksen



Adam Frank & Coursera



Confronting The Big Questions:
Highlights of Modern Astronomy

Rob and Dana Clark



Jonathan W. Friedberg

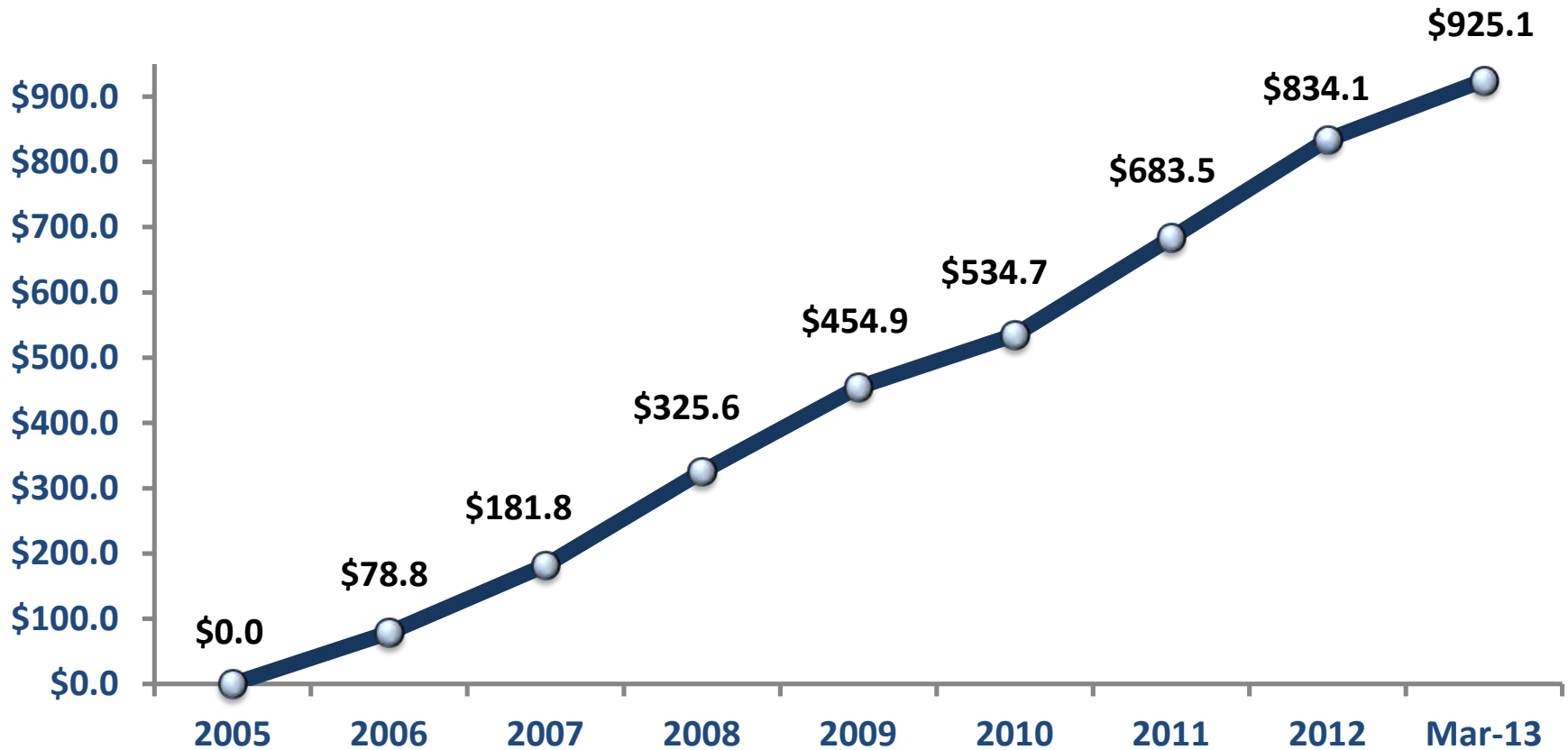


Michael Rotondo

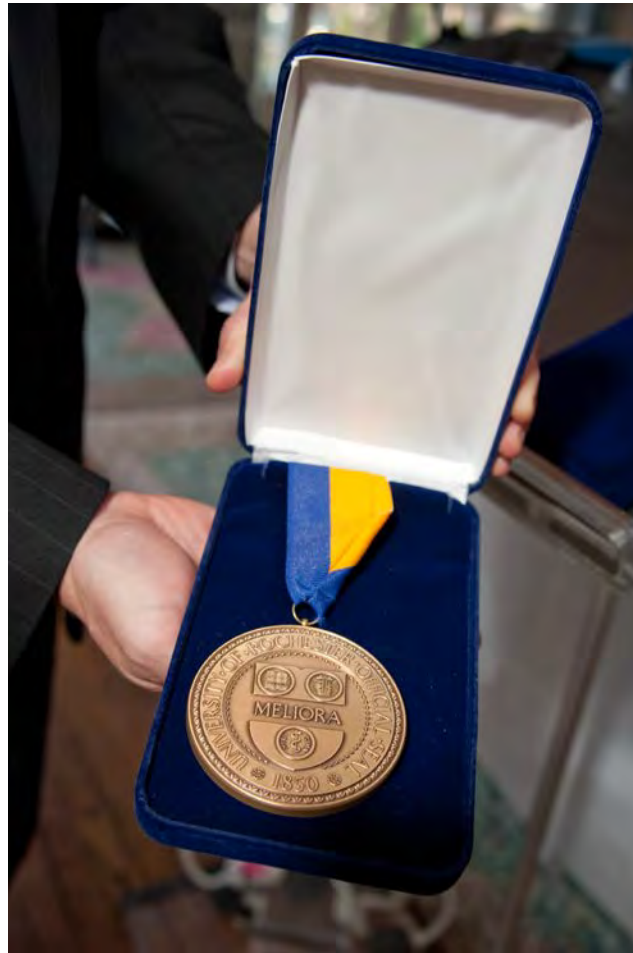


Advancement Total Contributions

(In Millions)

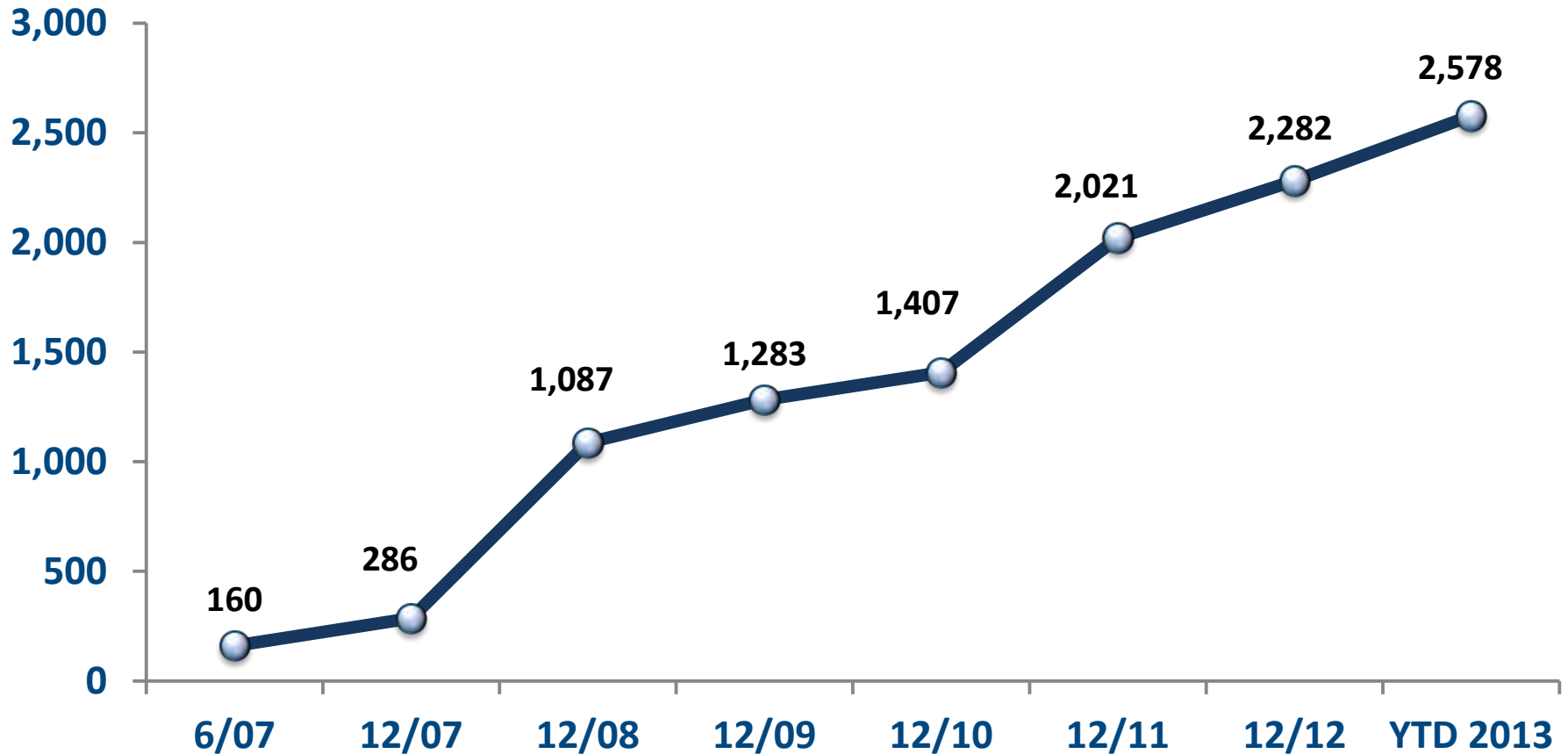


Faculty and Endowed Professorships



Progress Since the 2008 Strategic Plans Were Adopted

George Eastman Circle Membership



Georgia Gosnell



Gosnell Professorships

**Timothy Quill:
Gosnell Professor in
Palliative Care**

**Robert Panzer:
Gosnell Professor in
Quality and Safety**



Alan Hilfiker Gift



Jay S. and Jeanne P. Benet



Joseph N. Lambert and Harold B. Schleifer



The Dr. Elizabeth R. McAnarney Professorship in Pediatrics Funded by Roger and Carolyn Friedlander

Richard E. Kreipe



John J. Kuiper Distinguished Professor

David A. Bushinsky



James N. Doyle Senior Professor in Entrepreneurship

Ronald Goettler



Ani and Mark Gabrellian Professor

David M. Primo



Saunders Family Distinguished Professor in Neuromuscular Research

Charles A. Thornton



Richard and Margaret Burton Distinguished Professorship in Orthopaedics

Edward M. Schwarz



Denham S. Ward

Professor in Anesthesiology

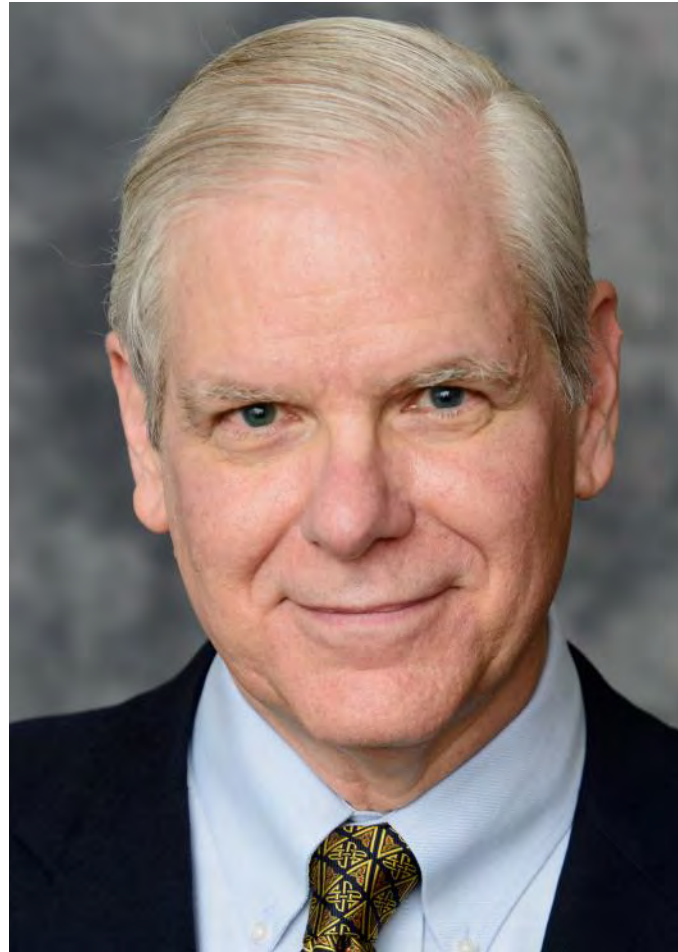
Michael P. Eaton



Charles E. and Dale L. Phelps Professorship in Public Health and Policy



James R. Fienup



55th Grammy Awards - Winners

Renée Fleming



Robert Ludwig



Department of Orthopaedics

Regis J. O'Keefe



Edward M. Schwarz



A Center of Excellence

PAIN MANAGEMENT



Women in Science, Technology, Engineering, and Entrepreneurship

Jie Qiao



John DiBartolomeo



Ally Zywicki



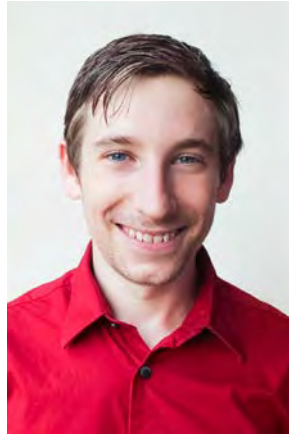
Men's Squash



Fulbright Recipients



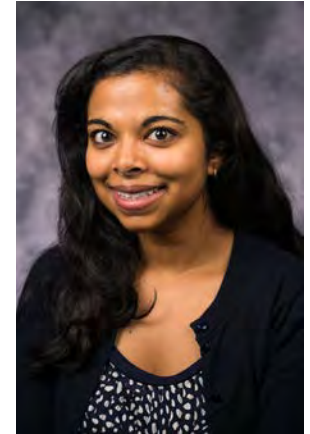
Rohini Bhatia



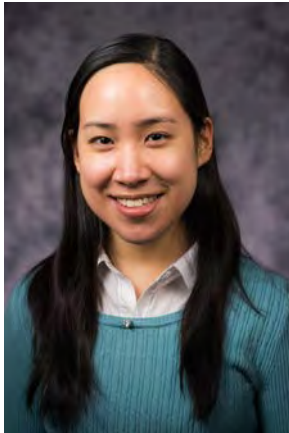
Andre Otis



Anja Weinrib-Weiss



Jyothi Purushotham



S. Rebekah Carpio



Cameron LaPoint

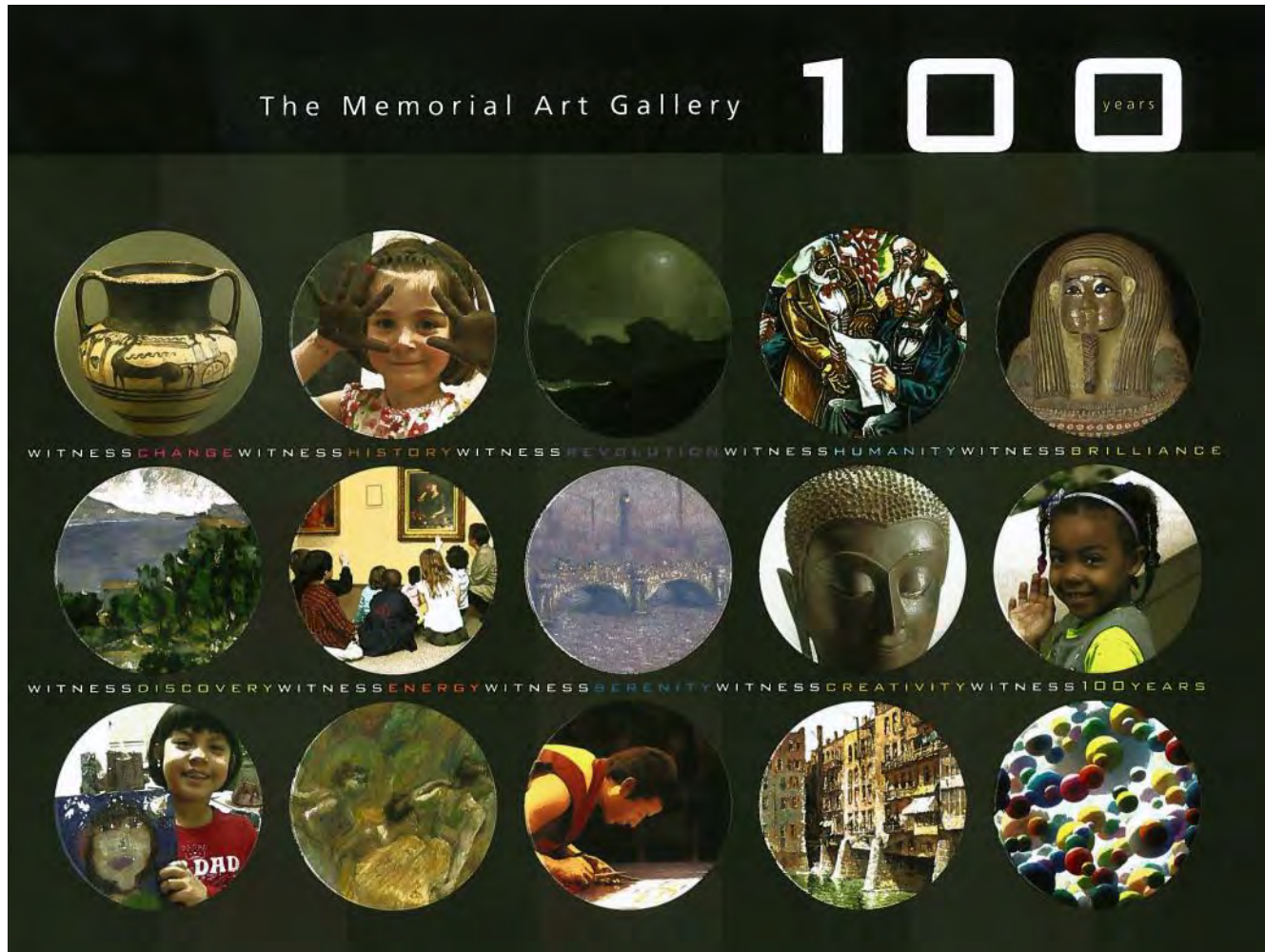


Ankit Medhekar

Lani Guinier



MAG Centennial



2013 Simon NYC Conference

Reform at a Crossroad: Economic Transformation in the Year Ahead



At the Landmark Roosevelt Hotel

Steven Chu

2013 College Commencement Keynote Speaker



Strategic Planning: *The Next Generation*

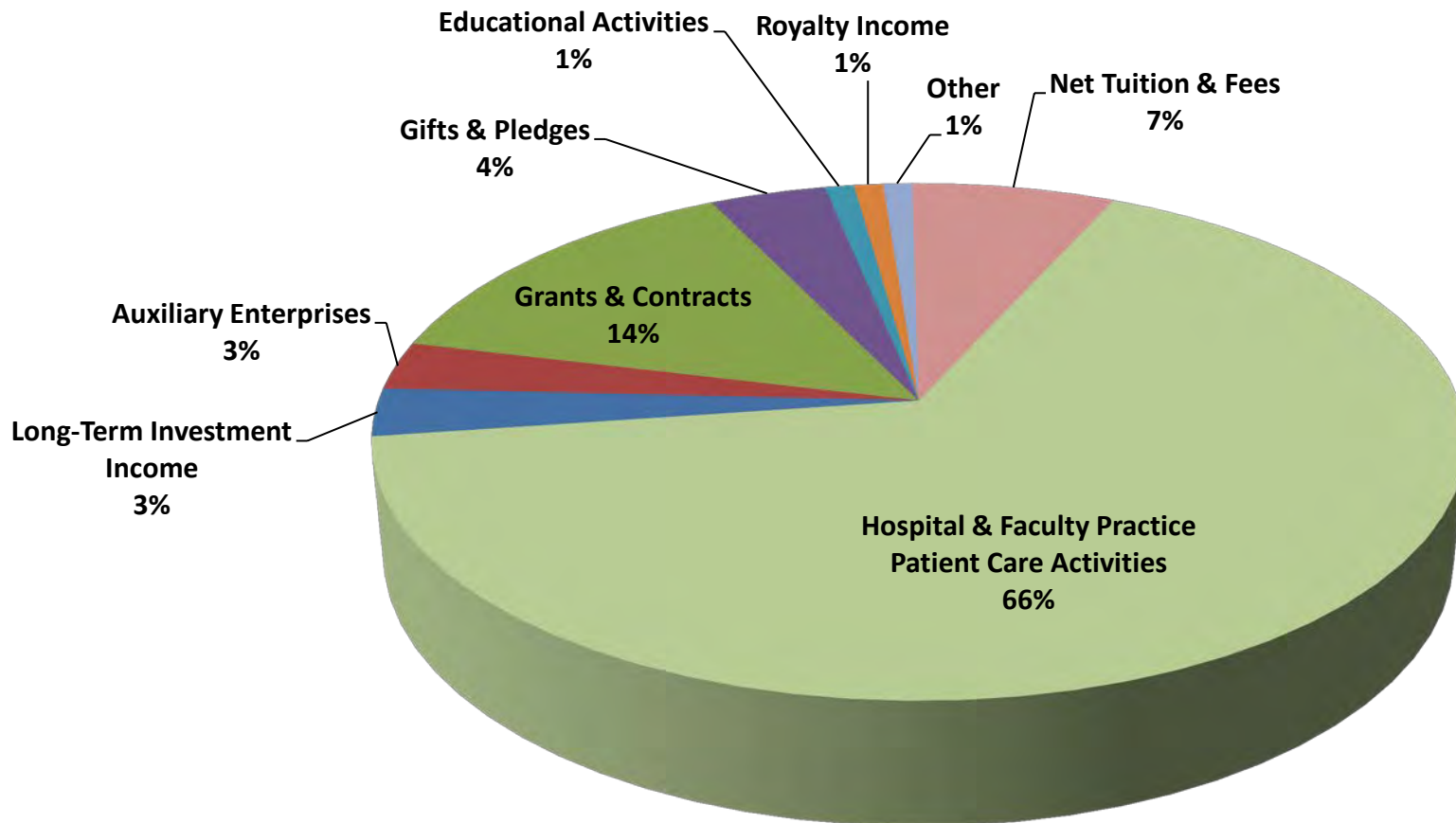


Macro Changes Since 2006-2008

- A. Academic Health Care**
- B. Sponsored Research**
- C. Tuition and Technology**
- D. Competitive Set**

A. Academic Healthcare

FY12 Operating Revenues (\$2.8B)



A. Academic Healthcare

Total Core Revenues and % of Core Budget Total (FY12 \$ in Thousands)

College	SMD	Simon	ESM	SON	Warner
\$192,099	\$189,984	\$40,286	\$36,714	\$16,674	\$9,639
40%	39%	8%	8%	4%	2%

Number of Tenure-track Faculty by School & Percent of University Total

College	SMD	Simon	ESM	SON	Warner
344	808	43	86	19	24
25%	61%	3.3%	6.5%	1.4%	1.8%

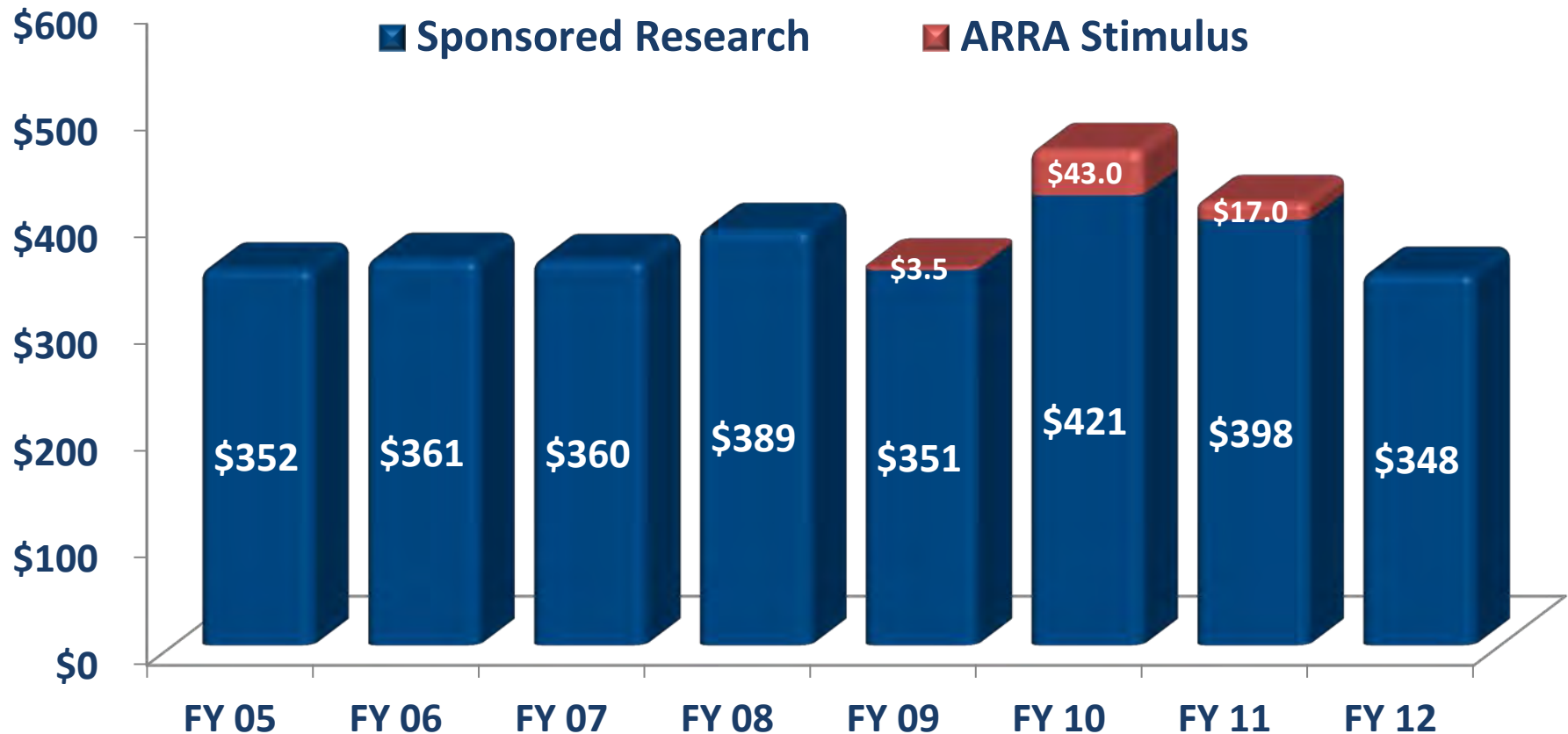
A. Academic Healthcare

Clinical Care Income & Expenses (\$ in Thousands)

	FY11	FY12
Clinical Care Revenue	\$ 1,810,596	\$ 1,907,959
Clinical Care Expenses	1,724,925	1,797,263
Operating Margin	85,671	110,696

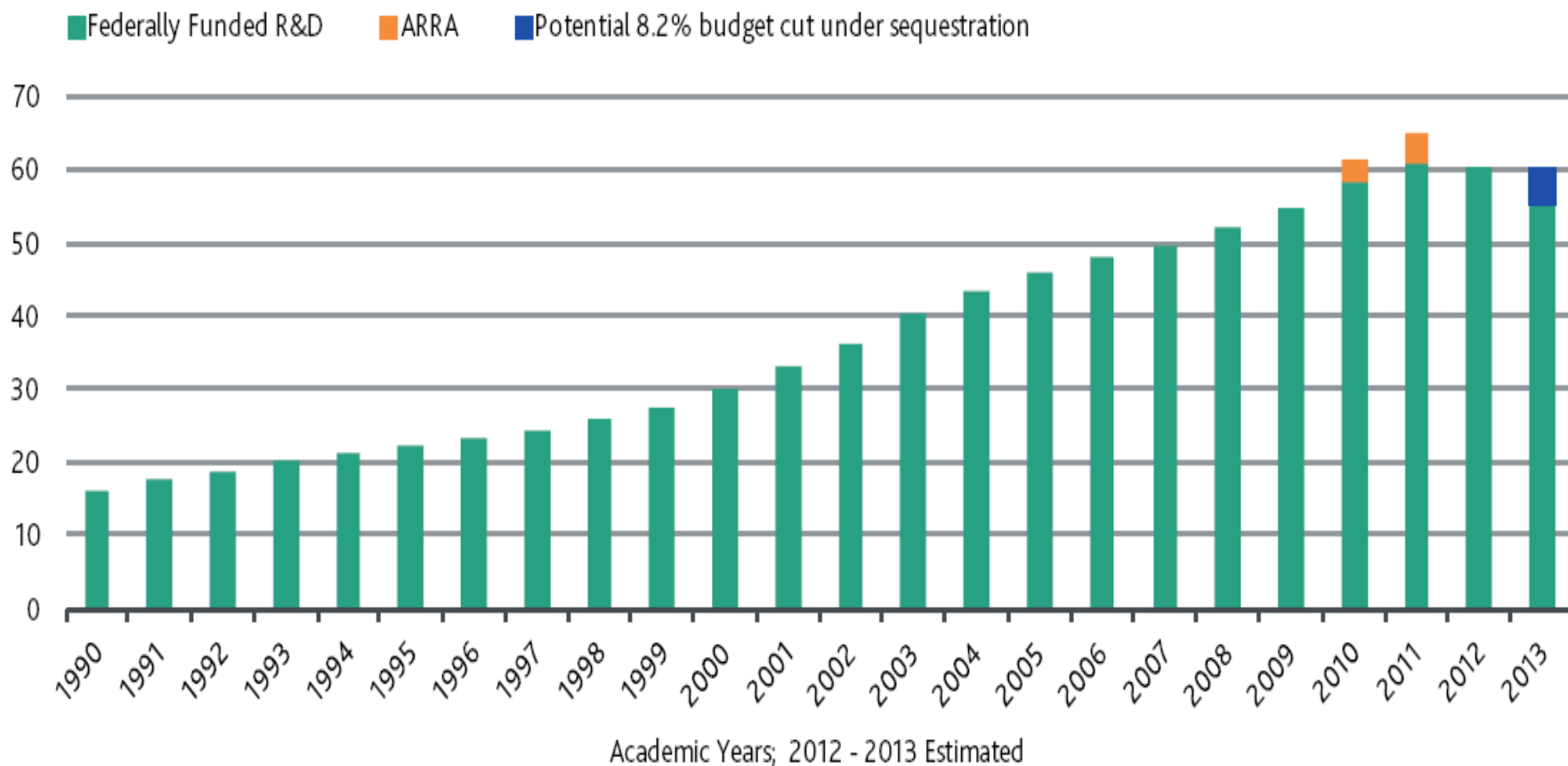
B. Sponsored Research Support

University of Rochester (In Millions)



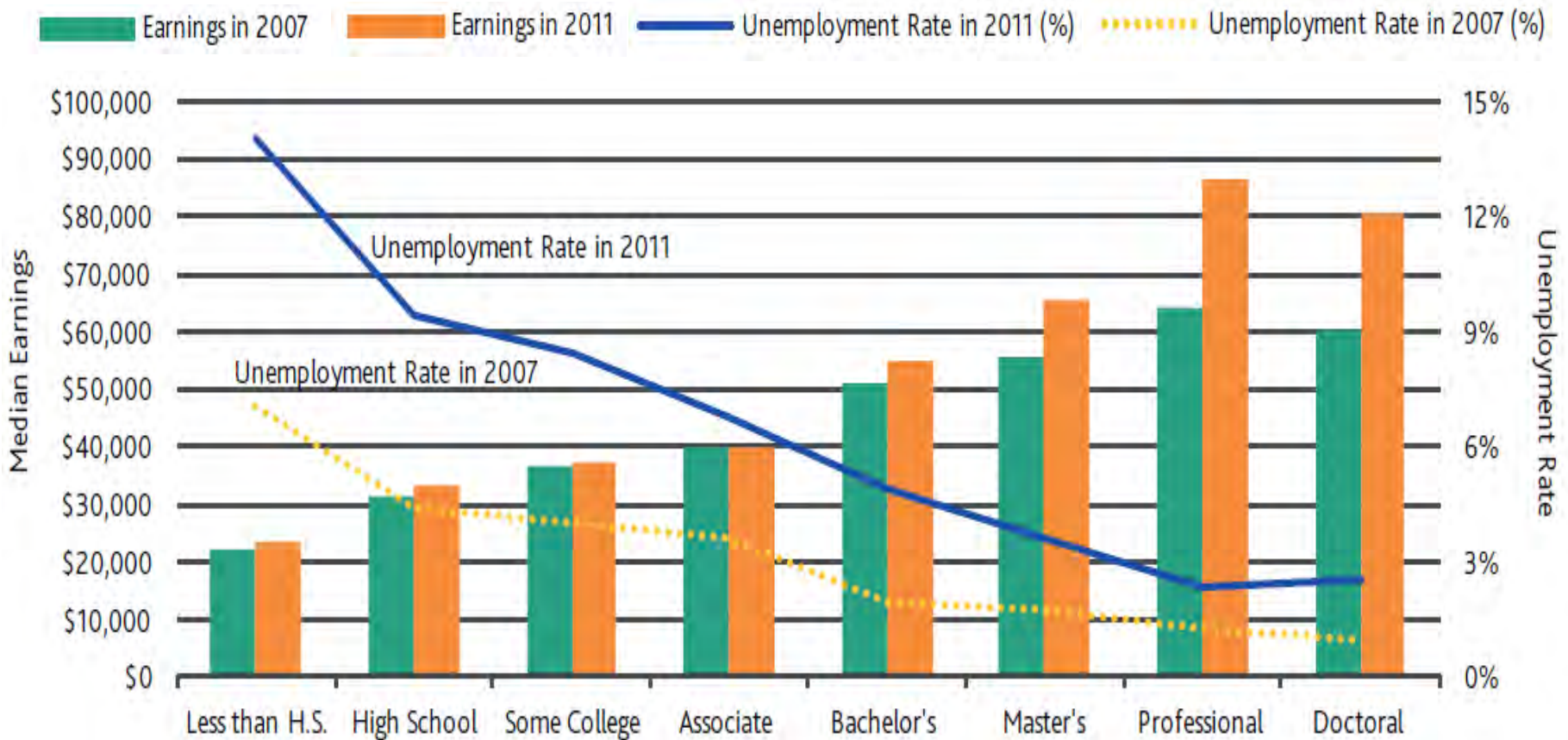
B. Sponsored Research

National Federal Research Funding (\$ in Billions)



C. Tuition & Technology

The Value of Higher Education Persists



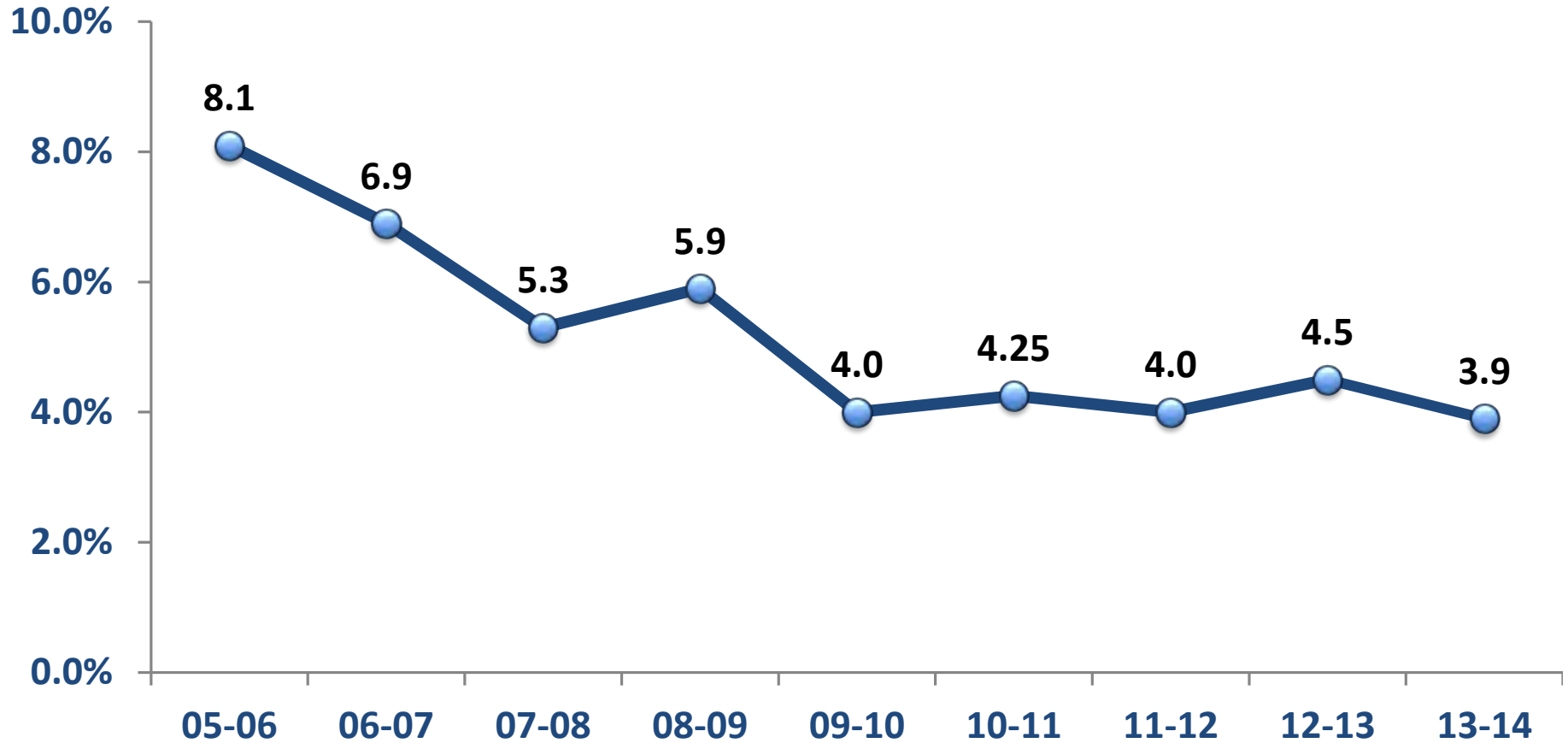
C. Tuition & Technology

FY13 Net Tuition by School

	College	SMD	Simon	ESM	SON	Warner
Net Tuition	60.0%	10.0%	82.0%	47.0%	84.0%	80.0%
Endowment	12.0	18.0	10.0	42.0	6.0	14.0
Gifts	4.0	6.0	7.0	3.0	1.0	3.0
Sponsored Research	16.0	31.0	0.0	0.0	3.0	2.0
Other Rev & Transfers	8.0	35.0	1.0	8.0	6.0	1.0

C. Tuition & Technology

College Tuition Increases



C. Tuition & Technology



“Taxpayers cannot continue to subsidize higher and higher and higher costs of higher education. Colleges must do their part to keep their costs down, and it's our job to make sure they do.”



“I think it's important in higher education that we get serious about the fact that the inflation of tuition has been much faster than inflation generally. And my view is we have to hold down the rate of tuition increases and fee increases in higher education.”

D. Competitive Set



D. Competitive Set

“We anticipate an ongoing bifurcation of student demand favoring the highest quality and most affordable higher education options.”



*~ Moody's Investors Service:
Higher Education Outlook for 2012*

D. Competitive Set

Red Shift in Our Leading Peers (In Billions)

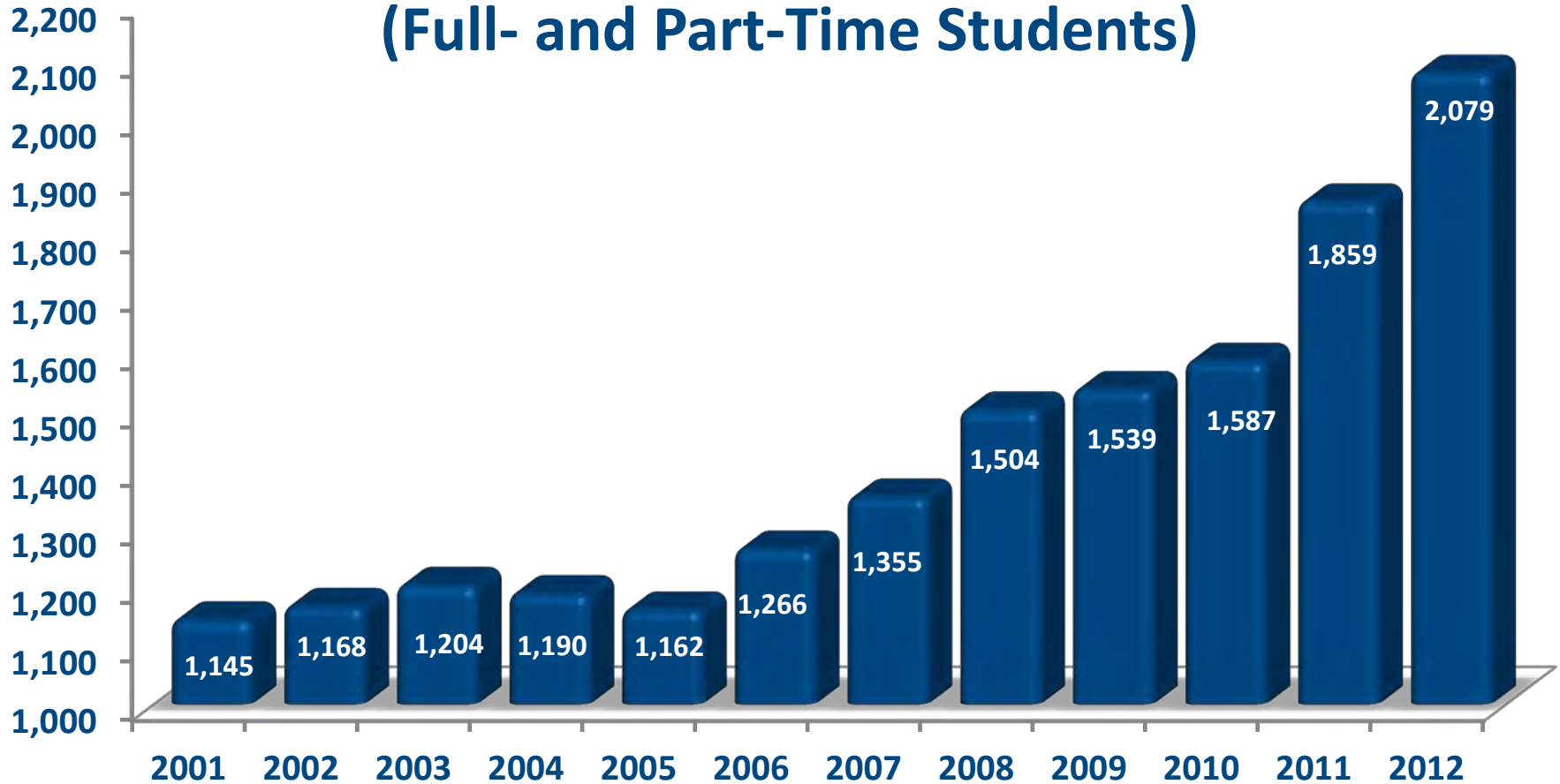
2012 Rank & Institution	2012 Endowment Market Value	Value of 10% Gain
1 Harvard	\$ 30.4	\$ 3.04B
2 Yale	19.3	1.93B
4 Stanford	17.0	1.70B
5 Princeton	17.0	1.70B
9 Texas System	7.6	760M
22 Dartmouth	3.5	350M
23 Vanderbilt	3.4	340M
26 Johns Hopkins	2.6	260M
40 Rockefeller	1.7	170M
45 Rochester	1.6	160M

2013 *U.S. News* Rankings

Rank	Institution
21	University of California-Berkeley
24	University of California-Los Angeles
24	University of Virginia
29	University of Michigan-Ann Arbor
30	University of North Carolina-Chapel Hill
33	University of Rochester

D. Competitive Set

Total University - International Students (Full- and Part-Time Students)



2008 Strategic Plan: Objectives

- **Top 20 U.S. research university**
- **Growth from 8,300 students in Fall 2004 to 10,000 students in 2015**
- **Concomitant growth in tenured and tenure track faculty**
- **Residential life improvements, expanded athletic facilities, and a substantial start on expanded College performing arts programs**
- **Breakthrough programs such as TEAM that link the College and Simon**
- **Higher quality patient care through expanded clinical care facilities**
- **\$1 billion or more of new facilities between July 2005 and June 2016**
- **A sustainable significantly higher level of annual giving**
- **Endowment draw by FY 17 of 6.1 percent or lower, with overall target of 5.5. percent**

Progress Since the 2008 Strategic Plans Were Adopted

A Leading Research University - FY11 Federal R&D Expenditures

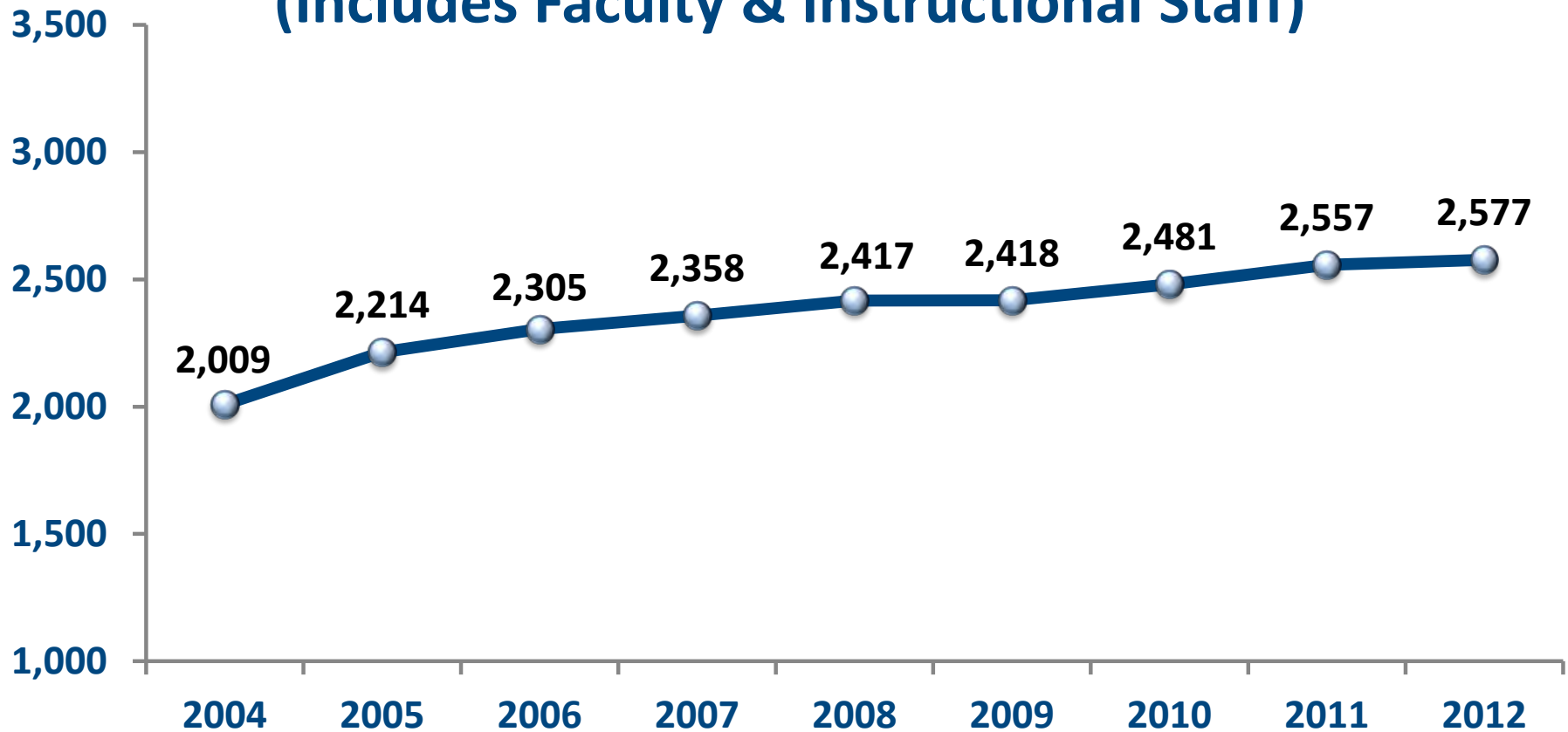
Institution	Norm Rank	\$ Rank
Johns Hopkins University	1	1
California Institute of Technology	2	28
University of California-San Diego	3	8
Stanford University	4	6
Washington University in St. Louis	5	16
Duke University	6	9
University of Pittsburgh	7	5
University of Pennsylvania	8	4
University of Washington	9	2
University of Maryland, Baltimore	10	10
Massachusetts Institute of Technology	11	15
Columbia University	12	7
Georgia Institute of Technology	13	23
Yale University	14	14
University of Rochester	15	30

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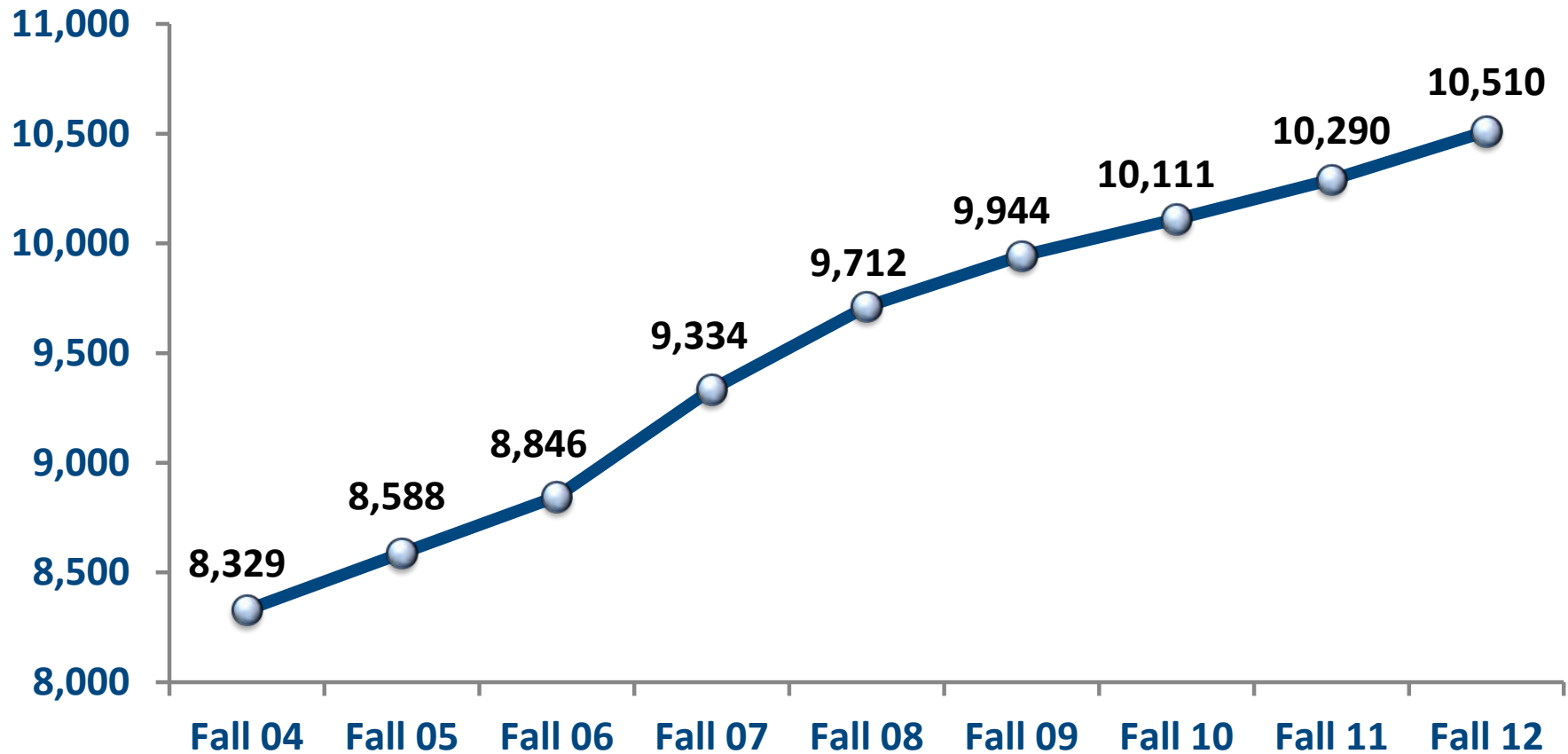
Progress Since the 2008 Strategic Plans Were Adopted

University Faculty Size (Includes Faculty & Instructional Staff)



Progress Since the 2008 Strategic Plans Were Adopted

University Enrollment



Progress Since the 2008 Strategic Plans Were Adopted

Health Sciences Center for Computational Innovation



Progress Since the 2008 Strategic Plans Were Adopted

**\$663M
in New
Facilities**



Progress Since the 2008 Strategic Plans Were Adopted

Raymond F. LeChase Hall



Progress Since the 2008 Strategic Plans Were Adopted

Strengthening Residential Life



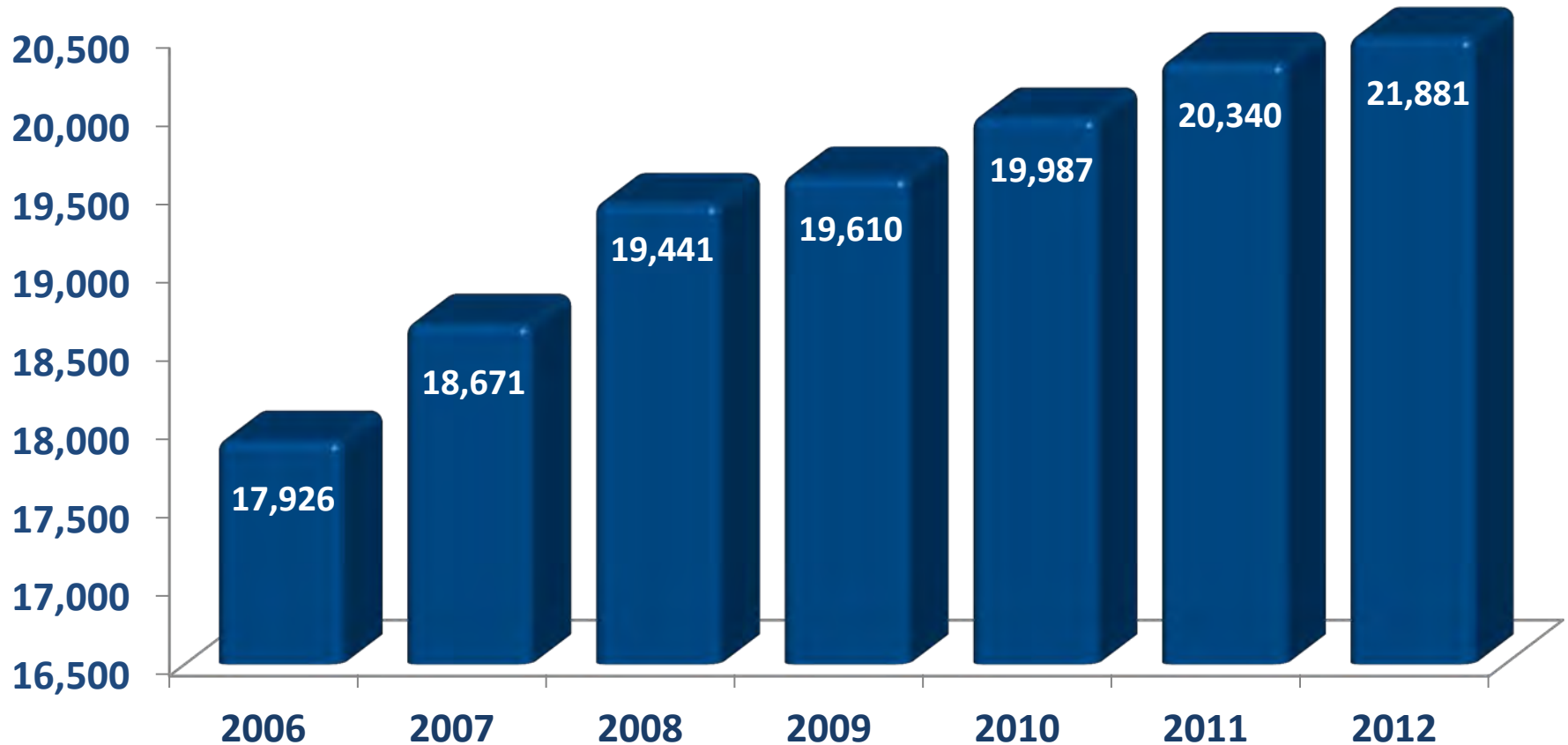
Progress Since the 2008 Strategic Plans Were Adopted

James P. Wilmot Cancer Center



Progress Since the 2008 Strategic Plans Were Adopted

Full-Time Equivalent Positions



Progress Since the 2008 Strategic Plans Were Adopted

University Endowment Draw Percent of Five-Year Average

FY 00	FY 05	FY 07	FY 09	FY 10	FY 11	FY 12	FY 13
6.9%	6.5%	6.6%	6.6%	5.7%	5.8%	5.9%	5.9%

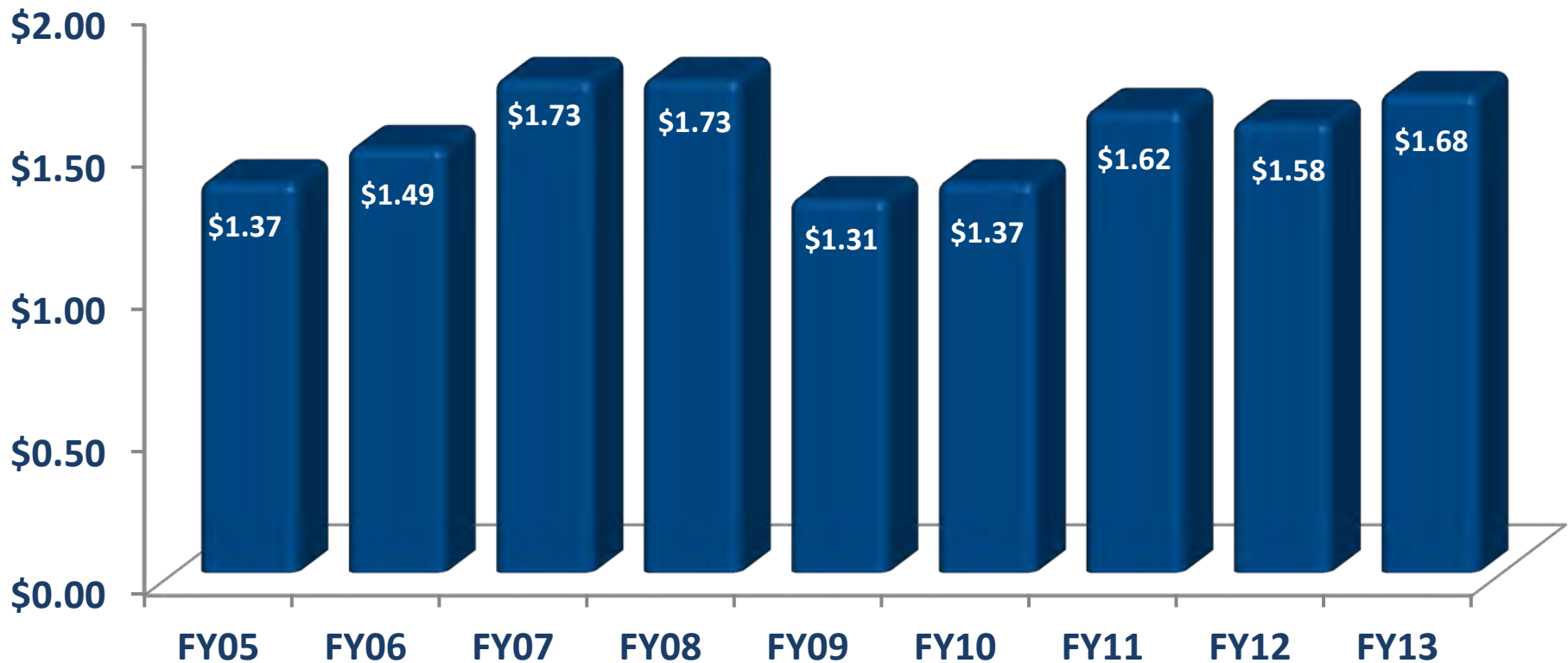
Long-Term Debt

(In Millions)



Progress Since the 2008 Strategic Plans Were Adopted

Endowment & Similar Funds (In Billions)



US Higher Education Outlook Negative in 2013

“For 2013, Moody’s revises its outlook for the entire US higher education sector to negative, marking a shift to negative from stable for even the sector’s market leading diversified colleges and universities.”



~ Moody's Investors Service:
Higher Education Outlook for 2012

Long Term Demand for Higher Education and Research Discoveries

“Despite ... challenging business conditions, the long term demand ... remains strong and we anticipate the large majority of rated organizations will continue to have a stable outlook.”

Framing the 2013-2018 Strategic Plan

A. Continuity

**B. Responding to a
Changed
Environment**

C. Building on Strength



Golisano Children's Hospital



Framing the AS&E 2013-2018 Strategic Plan



Framing the Simon 2013-2018 Strategic Plan



Framing the Medical Center 2013-2018 Strategic Plan



Framing the Eastman 2013-2018 Strategic Plan



Framing the Warner 2013-2018 Strategic Plan





LEARN
DISCOVER
HEAL
CREATE
MELIORA
EXALLES

AND LEARN THE WORLD'S
AND LEARN THE WORLD'S
AND LEARN THE WORLD'S
AND LEARN THE WORLD'S
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