

**Arizona University System
Technology and Research Initiative Fund (TRIF)**

Proposition 301 Business Plan,
The University of Arizona

Workforce Development:
The Educator Development Plan
(EDP)

1/13/2003

EXECUTIVE SUMMARY

The Educator Development Plan (EDP) addresses and proposes solutions to fundamental shortages of adequately prepared educators in science, math, and agricultural science. These shortages and the retention of these trained individuals in the local workforce have been identified as among the most critical issues facing economic growth in Arizona.

The University of Arizona is in a unique position to prepare teachers of the workforce of Arizona's New Economy. The University of Arizona already prepares the largest number of the science and math education teachers in the Arizona university system and is the only university to prepare agricultural science teachers. Collaborations among the UA Colleges of Education, Science, Agriculture, and Life Sciences, as well as with Arizona State University and Northern Arizona University, allow the UA to quickly address these critical workforce shortages. EDP proposes to educate 150 new secondary school math and science teachers, 150 new elementary school math and science teachers, and 40 new agricultural sciences teachers. A key part of EDP is the establishment of partnerships with industries that both crosscut and link all of these education programs.

EDP's strategy is built on the criteria set forth in the *Technology Research Initiative Fund's* that proposed activities realistically create multiple returns on Prop 301 dollar investments in local economic growth. EDP is focused on two primary areas; preparing science and math educators that will bolster technology-related workforce, and preparing specialty educator programs in agriculture that will stabilize critical workforce needs in Arizona's economy. Each of the EDP's key areas fulfill a component of the overall strategy of promoting economic development: without agriculture specialists to teach agriculture science, Arizona cannot maintain its current state of economic health, and without science and math educators Arizona cannot prepare for its future growth.

EDP will introduce new and bolster existing programs that will maximize the economic potential of educating educators for better economic outcomes. **First**, secondary education programs will be able to have the most immediate impact on Arizona K-12 students and schools because these populations are the bridge to local university teacher development programs and are most likely to be influenced at this stage. **Second**, elementary education programs will create a maximum impact on the youth of Arizona and motivate career paths in science, technology, and mathematics at an early age. **Third**, agricultural science education programs will sustain the tradition of agricultural innovation for Arizona's economy.

The sustainable demand for science, math and agriculture educators is reaffirmed by the great need for technicians, scientists, and engineers that will be created by the bioindustry activities of the Translational Genomics Research Institutes and the International Genomics Consortium. Launching companies based on drug discovery have extended timelines as long as ten years. By funding EDP today the future workforce needs of these companies can be orchestrated perfectly as if custom designed to meet the demands of Arizona's future bioeconomy.

The University of Arizona is seeking approximately \$4MM over the next five years to implement EDP. These funds will be phased out during this period to create a program that is self-sufficient through leveraging other sources of government funding and private sponsorship.

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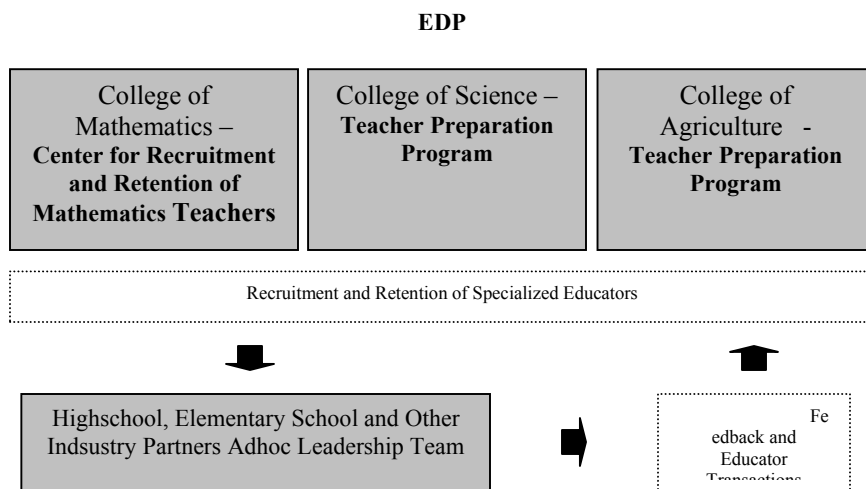
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SECTION 1 – CORE VISION/ PROJECT DESCRIPTION

1.1 Brief Overview of Industry/Area Addressed by Initiative

The University of Arizona has assumed a leadership role in the development of educator training programs to fuel the local economy and provide workforce for local growth industries. EDP will allow for the creation of three separate entities attached to the College of Science, College of Education, and the College of Agriculture and Life Sciences that will recruit, train, and retain technical educators through specific strategies and programs addressing individual needs. Relationships between EDP colleges and industry partners are key to the success of the plan. The illustration below demonstrates the interaction of these colleges and industry partners to achieve the common mission of the educator development plan:



1.2 Mission/Goals/Values/Vision of College, University, and Department Responsible

Mission - To address critical workforce shortages in Arizona for math and science educators, and agricultural science educators through active recruiting and retention programs.

Goals – The primary goals of EDP are:

- To create a seamless progression in math and science from elementary through secondary school for Arizona’s students.
- To build incentives and support for those students to enter math and science, and agricultural science teacher preparation programs.
- To establish incentives and support for math and science teachers to stay in teaching and agriculture specialists and nurses to stay employed locally.
- To install incentives for new-economy industries to take an active role in enhancing the education of future employees
- To instill viable programs that will accomplish EDP’s quantitative goals of graduating a significant number of math and science teachers and agricultural science teachers.

1.3 Products or Services Provided by EDP

Products and services provided by EDP fall into three categories; (1) secondary school math and science teacher programs, (2) elementary school math and science teacher programs, and (3) agricultural sciences teacher programs. It is important to note that several of the programs

outlined under secondary education will naturally overlap to benefit the recruitment, training, and retention of elementary school science and math teachers.

(1) **Secondary school math and science teacher programs –**

- Center for Recruitment and Retention of Mathematics Teachers:
 - **Tutoring Program** – This program is an important recruiting tool, which pairs students with current math teachers to develop curriculum innovations for K-12 students. The program begins with a 1-credit course for the mentor and student, pairing a mentor with a student.
 - **Scholarship Program** – The Office of Recruitment and Retention of Secondary Mathematics Teachers (ORRSMT) will provide scholarships and mentoring for both pre-service and new teachers.
 - **Induction Program** – This program is designed to aide in the retention of math teachers by pairing them with University mentors who will meet with them periodically to assess job satisfaction and engage in creative problem solving. Additionally, this program will assemble existing teachers monthly to assess common problems and share knowledge.
 - **Renewal Program** – This program provides travel expense reimbursement as incentive to attend the National Council of Teachers of Mathematics annual meeting to provide a connection to a larger community.
- College of Science Teacher Preparation Program:
 - **Science Education Degree Program** – this program integrates science and teaching in new courses offered in both the Colleges of Science and Education. A key aspect of this program is that students whose primary interest is in science can continue their science majors while getting the education they need to be certified as teachers. This greatly expands the number of potential science and math teacher candidates. Students who are interested in math and science but primarily interested in education will continue in the College of Education, so this program has the potential to double the number of students certified in math and science education. This program also leverages national efforts on the part of the National Science Foundation and other agencies to improve math and science education.
 - **Scholarship Program** – scholarships will be given to support those students that are serious about obtaining the field experience and taking the additional courses necessary to apply for teacher certification. Included will be scholarships to subsidize student internships for high school juniors and seniors.
 - **Retention Program** - This program leverages the ongoing project, Collaboration for the Advancement of Teaching Technology and Science (CATTs), which is pairing pre-service teachers with university scientists. The project will form partnerships with industry to provide paid summer internships and employment to secondary school teachers. This will provide for higher income and the opportunity to work in the industries that will be employing their students, to improve not only their content knowledge but to know what those students will need to know before entering the universities.
 - **Partners in the Education of Pre-Service Science Teachers (PEPST)** – This partnership assembles existing teachers and other knowledge sources to create means of providing quality pre-service experience. Often these proposed activities leverage additional industry relationships.

(2) **Elementary school math and science teacher programs:**

- Teach for Tucson - The University of Arizona will extend its highly acclaimed “Teach for Tucson” secondary teacher program to elementary teacher preparation. Each year, a cohort of 30 new schoolteacher candidates (150 over EDP’s 5 years)

will enroll in and complete a one-year Masters degree program strongly emphasizing instruction in science and math and is structured around a school-based professional internship in which students are placed with teachers selected for their excellence in science and math instruction.

(3) **Agricultural science teacher programs:**

- Informational Campaign - EDP will implement a campaign to build career opportunity awareness among high school and community college students.
- Scholarship Program – scholarships will be given to support those students that are serious about obtaining the field experience and taking the additional courses necessary to apply for teacher certification. Included will be scholarships to subsidize student internships for juniors and seniors in high school.
- Executive Fellows Program – This program was cut and funds will be reallocated toward complementary industry development activities yet to be determined.

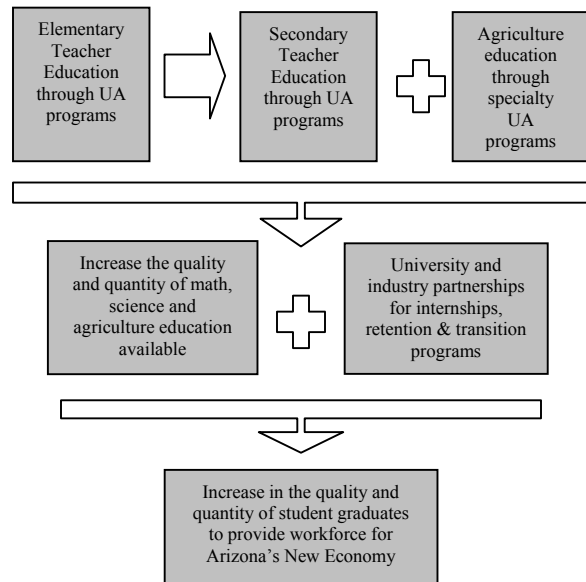
1.4 Positioning

The University of Arizona is well positioned to take a leadership role in educator development through the programs proposed under EDP. The University of Arizona already prepares the largest number of the science and math education teachers in the Arizona university system and is the only university to prepare agricultural science teachers. EDP will also leverage the world-renowned image and positioning of the University of Arizona and the City of Tucson. Collaborations among the Colleges of Education, Science, Agriculture and Life Sciences, as well as with the other two Arizona state universities and local government will allow the UA to effectively address the math and science pipeline issues that are critical to Arizona’s workforce.

The City of Tucson positions itself similarly to attract workers and companies. The Greater Tucson Economic Council states its positioning strategy as low business costs, low costs of living, and high quality of place including climate. Their marketing mantra is ‘*come for the technology...stay for the lifestyle.*’

1.5 Competitive Advantage

The sustainable competitive advantage of EDP is synergy - *cooperation, collaboration, and teamwork*. Specific characteristics of EDP lend to its competitive advantage. A key factor is that interventions targeted toward teachers are uniquely efficient because of their unusually large multiplier effect on students and eventually on science, technology, and agriculture employees. Moreover, there exists a natural incentive for industry partners to collaborate on these educator programs to ensure that an adequately trained workforce will be available to fuel their future growth. Finally, no institution in Arizona has a better foundation to build on to accomplish these educator development objectives. These synergies are demonstrated below:



SECTION 2 – THE MARKET

2.1 Competitive Assessment

The competitive environment for EDP consists of two central components: (1) unique alternatives available to core participants i.e. potential educators, (2) direct rivals.

- (1) EDP will need to consider the alternatives available to individuals considering career paths in education.

A general appeal must be created toward educator roles and then more specifically toward science, math, and agriculture, versus other areas of focus. The programs set forth do a good job at addressing these concerns through offering an array of industry interaction opportunities and career path expansion/retention support. The design of the programs allow for simultaneous preparation for teaching certification while students pursue primary degrees in science, math, and agriculture. Graduates from these programs will have to determine whether they will pursue a career in their major field or one in science and math education.

- (2) Direct rivals don't specifically apply to EDP however, it could be viewed that more attractive living and teaching environments at peer universities or other locales could be viewed as a source of competition. It is estimated, however, that in the decision to become a teacher, geographic factors are not the significant determinants.

2.2 Market Size and Trends

The local market for science, math, and agriculture educators is fairly fragmented and although thousands of teaching certificates have been issued to individuals over the past five years only an estimated 25% of those are currently active as teachers in Tucson. This figure still leaves a large shortage of qualified teachers and a recent survey of Tucson area schools cited Math and Science as within the top 5 teaching areas in short supply.

The retention of teachers is also an area of substantiated concern, with up to 40% of science and math teachers leaving within the first five years of employment. A key focus for the retention of these teachers is creating and enhancing formalized interaction with industry leadership. A recent survey of 1700 National Science Teachers Association members found that 93% of teachers who worked with scientists said it bolstered their motivation and enthusiasm for teaching science; 90% said it increased their understanding of the science content; and 87% said it improved their teaching.” These statistics lead the UA to believe that the success of its Executive Fellows Program and the Partners in the Education of Pre-service Science Teachers (PEPST) Program to be essential to assuring retention.

Locally, a significant decrease in the number of agricultural science educators has been experienced.

2.3 Sales Forecast

Sales in the case of EDP are roughly estimable as jobs created through the educator programs initiated. The following increases in trained workforce are projected for the five-year course of EDP:

ITEM	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006
Secondary Math and Science Teachers	11	10	17	33	35
Elementary Math and Science Teachers	30	30	30	30	30
Agricultural Science Teachers	5	5	10	10	10

SECTION 3 – OPERATIONAL STRATEGIES

3.1 Development and Production

3.1.1 Development Status

Secondary school math and science teacher programs –

- Center for Recruitment and Retention of Mathematics Teachers:
 - **Tutoring Program** – 50 new student tutors will be supported in 2002-2003 to follow up on the 28 that participated in 2001-2002.
 - **Scholarship Program** –\$20,000 will be available in 2002-2003 for program participants.
 - **Induction Program** – 15 first and second year middle and high school mathematics teachers participated in 2001-2002.
 - **Renewal Program** – 27 middle and high school mathematics teachers attended NCTM’s 80th Annual Meeting April 21-24, 2002 Las Vegas.

- College of Science Teacher Preparation Program:
 - **Science Education Degree Program** – 27 science majors completed at least one of the CoS TPP courses during the 2000-01 academic year. Currently, 18 students are enrolled in at least one of the CoS TPP courses with more expected in the spring 2002 semester.
 - **Partners in the Education of Pre-service Science Teachers (PEPST)** – To date, 27 experienced Tucson area secondary level science teachers have authored classroom tasks, supervised preservice teachers in completing the tasks, and have also provided guidance and advice in the development of the overall CoS TPP.

Elementary school math and science teachers:

- Teach for Tucson – Prop 301’s support of Teach for Tucson has yielded great results in qualifying science and math teachers at the elementary education level. Representatives from eight collaborating school districts comprised the 2001/2002 class.

Period	Interviewed	Admitted	Completions	Average M. and S. Credits	Average Age
2001/2002	72	31	29	37.72	24-55
2002/2003	50	28	NA	33.68	23-56

Agricultural science teachers:

- Informational Campaign – Currently, 150 high school and community college students have received information as part of this campaign.
- Scholarship Program – 27 scholarship applications were collected with estimated allocations to be approximately \$700 each.
- Executive Fellows Program – Interest from several partners has been generated for field experience internships.

This information provides reasonable confirmation that the EDP is on track if not ahead of schedule to meet or exceed the economic goals of the project as a whole.

3.1.2 Production Process

The process by which local economic stimulus will be generated is a three phased approach.

- Phase 1 – Prop 301 dollars will be leveraged to create and improve upon existing programs for the recruitment, training, and retention of educators in math and science, and the specialty areas. Specifically, Prop 301 dollars will be used to launch and support the early operations of the Center for the Recruitment and Retention of Mathematics Teachers (CRRMT) and the support of new programs under the already established College of Science Teacher Preparation Program (CoS TPP). New programs will be launched and designed in agriculture to fit target participant needs.
- Phase 2 – Prop 301 dollars will be used in an ongoing series of program activities provided through CRRMT, CoS TTP, and the College of Agriculture and Life Science to assure that prospective teachers are recruited, supported through certification, and retained.
- Phase 3 – Prop 301 dollars will be matched and phased out using other sources of government funding and private sponsorship.

3.1.3 Cost of Development

The cost of developing and maintaining EDP will rely primarily on in-kind contributions of time from existing academic and industry leadership. In addition to this human capital, the continued recruitment of new leadership comprises a significant portion of the cost of development. Additional costs include residual expenditures related to the creation of these education and retention programs. Additional details are available in Section 5 of the business plan.

3.1.4 Labor Requirements

Specific labor requirements of implementing the program of activities are detailed in the budget information provided in Section 5. Nearly 40% of the annual budget is allocated toward labor requirements and associated employee related expenses (personal services category).

3.1.5 Expenses and Capital Requirements

See Section 5 for detailed information on the projected expenditures and capital requirements for implementation and maintenance of the program of activities. Allowed capital budget allocations to building renovations and associated debt service are not included in EDP.

3.2 Marketing & Promotion

3.2.1 Strategy

The marketing strategy for EDP is differentiation. The level of support that prospective teachers will receive through these various programs is highly value added and differentiated from career paths available within their specific fields. This strategy will be carried out through the promotion of new programs utilizing a deliberate promotion mix. The individual programs have built-in incentives to attract and secure participation upon knowledge. The first year of many of these programs yielded highly correlative results that support this marketing strategy as revealed in Section 3.1.1.

3.2.2 Promotion Mix

The promotion mix will utilize existing channels for advertising, direct marketing, personal selling, and public relations. These channels are outlined below in Section 3.2.3.

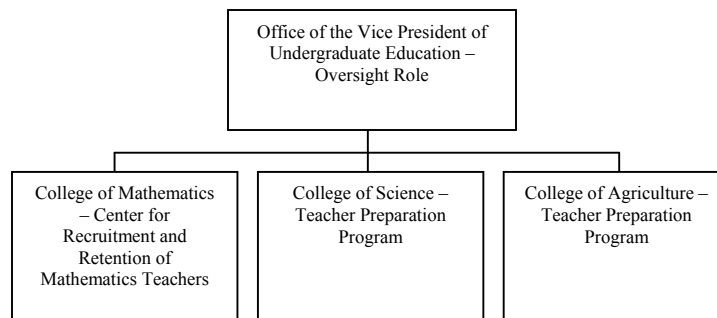
3.2.3 Advertising and Promotion Methods

The marketing strategy will utilize existing channels for advertising, public relations, and promotion. Among these are:

- Advertising:
 - Websites: <http://scied.mcb.arizona.edu/pepst.html> and many others
 - Print: brochures, magazines, academic journals, newspapers
- Direct Marketing
 - Mailings
- Personal Selling
 - Presentations at high schools, community colleges, and universities
- Public Relations
 - Attendance at annual industry meetings
 - Office of Economic Development Status Reports:
 - University/Community Proposition 301 Technology Report
 - Education forums and organization meetings
 - Ad hoc forums

3.3 Project Management

3.3.1 Organizational Chart and Description



The organizational management structure behind EDP consists of leadership from the four primary university organizations under which these recruitment and retention programs are being developed and executed, as well as the Office of the Vice President of Undergraduate Education’s general oversight role for programs under the Colleges of, Science and Agriculture and Life Sciences. Additionally, a multi-college advisory committee will oversee the implementation of the EDP plan as a whole to assure that the overall goals of the plan are being met.

3.3.2 Advisory Board and Oversight

The Office of the Vice President of Undergraduate Education will provide general oversight over the programs within its responsibility and ensure that the proposed programs are executed with the resources provided. Broad oversight for the Prop 301 plan as a whole will be conducted by a multi-college advisory committee including representatives from each of the colleges and other related parties.

3.3.3 Support Services

- University Administration –Office of Economic Development.
- Marketing –City of Tucson and University of Arizona resources
- Publicity – Arizona Daily Star, Arizona Wildcat, and others.

3.4 Risk & Strategy to Overcome Risks

3.4.1 Legal Risks/Means to Minimize Risks

[Not applicable]

3.4.2 Regulatory Problems/ Means to Minimize Risks

[Not applicable]

3.4.3 Political Risks/ Means to Minimize Risks

[Not applicable]

3.4.4 Business Risks/ Means to Minimize Risks

The business environment specific to Arizona creates several business risks that must be addressed. Arizona is notorious for underpaying its teachers and falling prey to locales that lure teachers out of Arizona with better salaries. However, marketing efforts under EDP target specific teaching needs in science, math and agricultural science and provide a linear path (largely subsidized by scholarship incentives) from the University of Arizona to the schools at which participants will be employed. EDP provides for the collaboration of UA, elementary school, middle school, and high school leadership to assure that transitions are made consistently and efficiently. In this respect marketing strategy mitigates the supply and demand risk associated with price elasticity for Arizona teaching positions.

3.4.5 Competitive Risks/ Strategy for Addressing Risks

Since the relatively recent removal of the requirement that teachers in the state of Arizona be degree-certified, the University of Arizona has experienced competitive pressure from non-degree teacher certification programs. The teacher certification program at Rio Salado College is one such competitor. Consistent with EDP's marketing strategy of differentiation, the advantages of better job placements, slightly higher wages, greater potential for advancement, and better life-long career connections are sold to existing and potential participants. Additionally, the nature of a program that targets existing technical college students and encourages them to engage in a teacher certification program to transition into Science, Math and Agricultural Science teaching avoids much of this external competitive risk altogether.

3.5 Sustainability

3.5.1 Anticipated Funding Sources for On-going Support

A majority of the budgeted operational expenses consist of scholarships and waivers used as incentives for participating in the programs within the Colleges of Education, Agriculture and Life Sciences, and Science. All three Colleges involved have committed to replacing the funding provided from TRIF sources, or phasing out programs, within five years. All three Colleges will direct some of the effort of their development efforts toward fund raising to replace TRIF support for scholarships and waivers. Additionally,

by year three much of the incidental expenses (\$50,000 annually) such as supplies to support operations will be phased out and absorbed by the individual college departments under which EDP new hires reside.

3.5.2 Timeline for Transitioning-out TRIF Funds

- FY 2002 – All of the planned operations were carried out on only 94% of the budgeted amount. This includes the 3% reduction in projected revenues due to a shortfall in sales tax revenue and an industry partnership/internship program that has been phased out.
- FY 2003 - Scholarship fund allocations will be phased out by an estimated 10%+. Incidental expenses will begin being phased out.
- FY 2004 - Scholarship fund allocations will be phased out by an additional estimated 30%+. Incidentals will continue to be phased out.
- FY 2005 - Scholarship fund allocations and incidentals expenditures will be mostly phased out.
- FY 2006 - The remaining TRIF fund allocation will be comprised of faculty positions and contributions that will begin being absorbed by individual college departments and phased out by other sources.

Educator Development Plan

SECTION 4 – GOALS/METRICS/OUTCOMES

4.1 Specific, Realistic, & Measurable Goals

4.1.1 ROI

SEC #	ITEM	FY 2002	FY 2003	FY 2004	FY 2005	FY 2006
6.1.2	NA	NA	NA	NA	NA	NA
6.1.3	NA	NA	NA	NA	NA	NA
6.1.4	Completers of Secondary Math/Sci Teacher Prep	11	10	17	33	35
	Completers of Elementary Math/Sci Teacher Prep	30	30	30	30	30
	Completers of Agricultural Science Teacher Prep	5	5	10	10	10
6.1.5	College of Science Teacher Preparation Program	P1	P2	P3	P4	P5
6.1.6	Collaborations between Colleges of Ed, Science, Agriculture	P1	P2	P3	P4	P5
6.1.7	NA	NA	NA	NA	NA	NA

*Indicates metrics not yet estimable. These will be added in coordination with the Office of Economic Development's development of the system by which growth will be tracked and attributed in the *University/Community Proposition 301 Technology Report*.

4.1.2 Technology Transfer

[Not applicable]

4.1.3 Companies Relocating

[Not applicable]

4.1.4 Work Force Contributions

The most significant measures of EDP's success are measures of enrollment in new educator programs, and completion of these programs and increase in locally active teachers. The number of completions in secondary math and science teacher preparation, elementary math and science teacher preparation, and agricultural science teacher preparation will be tracked periodically and used as the primary measure of achieving this plan's goals.

4.1.5 Specific Curriculum Innovations

EDP will launch the Science Prep Course in the College of Science for the preparation of K-12 educators. This curriculum innovation's progress will be tracked in five phases indicated with "P1-5". These phases include the design of the program on through to its maintenance and feedback retrieval for further innovations.

4.1.6 Partnerships/Collaborations

The primary collaboration that is fundamental to the success of EDP are inter-college relationships that will be maintained through ad hoc meetings and other regular interactions of key faculty and project coordinators. Additionally, adhoc meetings are held between UA EDP collaborators and target school leadership including elementary and high school representatives.

4.1.7 Other

[Not applicable]

4.2 Timeline For Achievement of Goals

The estimated timeline for achievement of goals is included above in section 4.1.1.

4.3 Early Proof of Performance

4.3.1 Implementation of Goals for First Three Years

The first year of EDP was a success. Despite slightly lower than budgeted funding EDP met its primary goals and was able to launch many new efforts that would not have been possible in this time of budget cuts without the TRIF funding. Section 3.1.1 outlines in detail the progress that has been made toward the overall goals of EDP. With this first year of successes and strategies to continue to expand the newly launched programs, EDP forecasts that it will be able to meet if not exceed all of its milestones for the first three years of operations, with the largest challenge being the ability to attract undergraduates into secondary science teaching.

4.3.2 Specific Efforts to Produce Rapid Results

By leveraging the close-knit community at the University of Arizona and Tucson EDP has created relationships that will serve to create a maximum impact of proposed activities. Specifically, these relationships allow for a quick and efficient transition from science and math based teacher education into school teaching positions statewide. These relationships include close working relationships with the school districts locally and statewide.

SECTION 5 – PRO FORMA FINANCIALS

5.1 Detailed Funding Request, Including Sources

	<i>% per PROGRAM</i>	<i>FY 2003 Original</i>	<i>FY 2003 Revised</i>	<i>FY 2004 BUDGET</i>	<i>FY 2005 BUDGET</i>	<i>FY 2006 BUDGET</i>
REVENUE		<u>\$ 800,000</u>	<u>\$ 938,457</u>	<u>\$ 800,000</u>	<u>\$ 800,000</u>	<u>\$ 800,000</u>
EXPENDITURES						
OPERATING BUDGET						
Personal Services		260,100	425,493	273,200	286,900	301,200
Agricultural Science Educator Development Programs	0%	↓	↓	↓	↓	↓
Elementary Education Support	38%	↓	↓	↓	↓	↓
Science and Math Educator Development Programs	62%	↓	↓	↓	↓	↓
ERE		50,700	79,132	53,300	55,900	58,700
All Other Operating		489,200	433,832	473,500	457,200	440,100
Agricultural Science Educator Development Programs	20%	↓	↓	↓	↓	↓
Elementary Education Support	27%	↓	↓	↓	↓	↓
Science and Math Educator Development Programs	53%	↓	↓	↓	↓	↓
TOTAL OPERATING BUDGET		<u>800,000</u>	<u>938,457</u>	<u>800,000</u>	<u>800,000</u>	<u>800,000</u>
CAPITAL BUDGET						
Building Renovation		0	0	0	0	0

- In FY 2002 the actual revenues received were less than that originally budgeted due to an overall 3% shortfall on sales tax revenues.
- The percentage trends are expected to continue throughout the five-years with the exception of reductions in Other Operating throughout the five year period for the phasing out TRIF funds. These reductions will be primarily in scholarships and incidentals both allocated to Other Operating in the above budget.

5.2 Cash Flow Statement (If Applicable)

[Not included, will be included when developed]

5.3 Income Statement (Resources and Planned Expenditures)

[Not included, will be included when developed]