

### **Appendix A**

#### **Vision and Guiding Principles for UT-RGV**

##### Vision, Guiding Principles, and Strategic Goals

The vision for UT-Rio Grande Valley has been expressed as follows:

*The new University of Texas in the Rio Grande Valley will provide an outstanding education to the students of South Texas, Texas, the United States and the world. This education will be of the highest quality; it will be affordable, accessible and innovative. The new university will transform Texas and the nation by becoming a leader in student success, teaching, research and healthcare.*

The goals and guiding principles are as follows:

- Fully integrate next generation technology and customized learning to increase affordability and maximize student success.
- Promote access to postsecondary education to a diverse student body to become one of the largest and most successful Hispanic-serving institutions in the U.S.A.
- Employ the highest quality faculty members and staff who pursue global excellence in teaching, research, healthcare and service.
- Streamline academic and administrative programs and re-design processes to increase productivity and promote a student- and service-centered mode of operation.
- Promote arts and humanities programs to produce state, national and world leaders who are bicultural, bi-lingual, and bi-literate.
- Develop programmatic strength in the areas of science, technology, engineering, mathematics, and health.
- Develop a Medical School of the first class, with outstanding undergraduate and graduate medical education, public health, health professional degrees and clinical research, to improve the health of the community.
- Become a global leader in higher education, health education, bio-medical research, emerging technology and preparing students to be lifelong learners .
- Pursue applied and translational research to address critical local, state, national, and global needs.
- Build on the excellent economic activity and strength of the State of Texas and benefit from the State's leadership in the world.
- Provide a leadership role in fostering economic and community partnerships to help solve local, state, national, and global problems.
- Promote innovation and knowledge discovery with business and industry that will lead to job growth and improvements in the quality of the region's workforce.
- Build a hub for inventions and intellectual property that will lead to economic and community prosperity and an improved quality of life for the region, the State, the nation and our world.

- Serve as a “Gateway to the Americas” by cultivating partnerships with global leaders in education, health, research and other strategic, high-growth industries.
- Leverage the size, strength, and excellence of the University of Texas System and its fifteen outstanding institutions to shorten the time it takes to achieve these goals.

It is assumed that UT-RGV’s founding president will bridge the gap between the stated vision and goals and the operational decision making that will be required to execute on the commitments.

## Appendix B

### Business Plan Working Group Charge

#### Working Group Charge

The charge of the Business Plan Development Working Group is to develop the framework for a sustainable and innovative business model in support of a university “of the first class” as outlined in the authorizing statute.

#### Principles

The development of the business model will be driven by a student-centered approach that is aligned with the Project South Texas guiding principles. The group’s work will be based on assessment and research of best-practices and innovation and mindful of the need for a sustainable long-term view.

#### Process

The working group will research innovations and best-practices in existing models throughout the U.S and the world and reach out, as appropriate, to other institutions and peer working groups. Once identified, the elements of the business model framework will be grouped and the framework document developed.

#### Relationship to Other Project Work

The work of the peer working groups is important as elements to be included in the business model framework will be developed by those groups. As the work of the peer working groups will heavily inform the elements of the business model framework, a final review shall be conducted to ensure alignment. Critical elements, those essential for the new university to be functional on day one, will be communicated to the *Change Management* working group.

#### Deliverables

Deliverables will be identified for both the short term and long term. Short term is for those items that can be implemented from now to August 31, 2015. Long term is for those that can be implemented after September 1, 2015.

1. Define affordability and accessibility for an emerging research institution
2. Develop a sustainable and innovative business model that includes:
  - a. Innovative tuition and fee model that balances the needs of an emerging research institution while maintaining accessibility and affordability.
  - b. Adequate resources to support the new institution by becoming a leader in student success, instruction, research, public and community service, and healthcare.

- c. Financial impacts of global student recruitment.
  - d. Strategies and resources that will enrich the student life and educational experience.
  - e. Financial impact of programs to enhance the professional, academic and social aspects of student development.
  - f. Financial impacts of strategies to recruit and retain high quality faculty, staff, and administrators.
  - g. Innovative revenue generation and resource allocation models.
  - h. University wide cost efficiencies.
3. Develop a fiscal sustainability model that incorporates various metrics and national benchmarks.

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## Appendix C

### Business Plan Development Working Group Members

First Name	Last Name	Department
Tomas	Guajardo *	Budget Office
Linda	Granja	Business Affairs
Nikki	Hodgson	Enrollment Management
Karla	Mongeon-Stewart	Academic Affairs
Stephanie	Mendez	Student Government Association
Juan C.	Gonzalez *	Budget Office
Cristina	Castillo	Office of the VP for Student Affairs
Richard	Wilson	Budget Office
Claudia	Dole	Office of Academic Affairs Graduate Studies
Joshua	Johnson	Student Government Association

\* Co-Chairs

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**Appendix D****UT-Rio Grande Valley Authorizing Statute, Senate Bill 24  
84th Texas Legislature**

S.B. No. 24

## AN ACT

relating to the creation of a new university in South Texas within  
The University of Texas System.

BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF TEXAS:

SECTION 1. AMENDMENT TO EDUCATION CODE. Subtitle C, Title 3,  
Education Code, is amended by adding Chapter 79 to read as follows:

CHAPTER 79. UNIVERSITY TO BE ESTABLISHED IN SOUTH TEXAS

Sec. 79.01. DEFINITIONS. In this chapter:

(1) "Board" means the board of regents of The University  
of Texas System.

(2) "University" means the university established under  
this chapter.

Sec. 79.02. ESTABLISHMENT; SCOPE. (a) The university is a  
general academic teaching institution under the governance,  
management, and control of the board of regents of The University of  
Texas System.

(b) As necessary to achieve the maximum operating efficiency of  
the university, the board shall provide for the organization,  
administration, location, and name of the university and of the  
colleges, schools, and other institutions and entities of the  
university, which must include:

(1) an academic campus and other academic operations in  
Cameron County;

(2) an academic campus and other academic operations in  
Hidalgo County;

(3) the medical school and other programs authorized for  
The University of Texas Health Science Center--South Texas under

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Subchapter N, Chapter 74, subject to the provisions of that subchapter regarding the location of certain facilities and programs of the health science center;

(4) the facilities and operations of the Lower Rio Grande Valley Academic Health Center established under Subchapter L, Chapter 74; and

(5) an academic center in Starr County.

(c) The board shall equitably allocate the primary facilities and operations of the university among Cameron, Hidalgo, and Starr Counties.

(d) The board shall ensure that the medical and research programs of the medical school component of the university are conducted across the region and have a substantial presence in Hidalgo County and Cameron County. The board shall also ensure the provision of interdisciplinary education across health professions within the university.

(e) The authority of the board under this section to achieve the maximum operating efficiency of the university and to provide for the organization, administration, and location of colleges, schools, and other institutions and entities of the university prevails over other law, including Section 74.611.

(f) The board has all the powers and duties provided by prior law, as that law existed at the time the applicable university or other entity was abolished, in regard to:

(1) The University of Texas at Brownsville, The University of Texas--Pan American, and any other institution, college, school, or entity abolished under the Act authorizing creation of the university; and

(2) any facility, operation, or program that is transferred to the university under that Act.

(g) The board may impose and collect any fee authorized by prior law, as that law existed at the time the applicable university

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was abolished, for The University of Texas at Brownsville or The University of Texas--Pan American, as determined by the board and subject to the limitations provided by the prior law authorizing the fee. The abolition of The University of Texas at Brownsville and The University of Texas--Pan American does not affect any pledge of revenue from a fee made by or on behalf of either of those universities to pay obligations issued in connection with facilities for which the fee was imposed and the obligations were issued.

Sec. 79.03. COURSES AND DEGREES. (a) The board may prescribe courses leading to customary degrees offered at leading American universities and medical schools as applicable and may award those degrees, including:

(1) bachelor's, master's, and doctoral degrees and their equivalents; and

(2) medical school degrees and other health science degrees.

(b) The board shall award degrees in the name of the university.

(c) A department, school, or degree program may not be instituted without the prior approval of the Texas Higher Education Coordinating Board, except that the university may include any department or school or offer any degree program previously approved for The University of Texas--Pan American or The University of Texas at Brownsville or expressly authorized by this chapter or other law.

Sec. 79.04. UNIVERSITY OF THE FIRST CLASS. The board shall make any other rules and regulations for the operation, control, and management of the university as may be necessary for the conduct of the university as a university of the first class.

Sec. 79.05. FACILITIES. The board shall provide for adequate physical facilities for use by the university.

Sec. 79.06. GIFTS AND GRANTS. The board may solicit, accept, and administer, on terms and conditions acceptable to the board,

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gifts, grants, or donations of any kind and from any source for use by the university.

Sec. 79.07. JOINT APPOINTMENTS. The board may make joint faculty appointments to positions in the university and to positions in other institutions under the governance of the board.

Sec. 79.08. PARTICIPATION IN PERMANENT UNIVERSITY FUND. The legislature finds that the university is an institution of higher education "created at a later date" for purposes of Section 18(c), Article VII, Texas Constitution. If the Act enacting this chapter receives a vote of two-thirds of the membership of each house of the legislature, when established the university is entitled to participate in the funding provided by Section 18, Article VII, Texas Constitution, to the same extent as similar component institutions of The University of Texas System.

Sec. 79.09. CENTER FOR BORDER ECONOMIC AND ENTERPRISE DEVELOPMENT. (a) The board shall establish a center for border economic and enterprise development at the university.

(b) The center established under this section may:

(1) develop and manage an economic database concerning the Texas-Mexico border;

(2) perform economic development planning and research;

(3) provide technical assistance to industrial and governmental entities; and

(4) in cooperation with other state agencies, coordinate economic and enterprise development planning activities of state agencies to ensure that the economic needs of the Texas-Mexico border are integrated within a comprehensive state economic development plan.

(c) The center may offer seminars and conduct conferences and other educational programs concerning the Texas-Mexico border economy and economic and enterprise development within this state.

(d) The board may solicit and accept gifts, grants, and

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donations to aid in the establishment, maintenance, and operation of the center.

(e) The center shall cooperate fully with similar programs operated by Texas A&M International University, The University of Texas at El Paso, and other institutions of higher education.

Sec. 79.10. TEXAS ACADEMY OF MATHEMATICS AND SCIENCE. (a) The board shall establish The Texas Academy of Mathematics and Science at the university. The academy serves the following purposes:

(1) to provide academically gifted and highly motivated junior and senior high school students with a challenging university-level curriculum that:

(A) allows students to complete high school graduation requirements, including requirements adopted under Section 28.025 for the advanced high school program, while attending for academic credit a public institution of higher education;

(B) fosters students' knowledge of real-world mathematics and science issues and applications and teaches students to apply critical thinking and problem-solving skills to those issues;

(C) includes the study of English, foreign languages, social studies, mathematics, science, and technology; and

(D) offers students learning opportunities related to mathematics and science through in-depth research and field-based studies;

(2) to provide students with an awareness of mathematics and science careers and professional development opportunities through any appropriate means such as:

(A) seminars;

(B) workshops;

(C) collaboration with postsecondary and university students, including opportunities for summer studies; and

(D) internships in foreign countries; and

(3) to provide students with social development activities that enrich the academic curriculum and student life, including, as determined appropriate by the academy, University Interscholastic League activities and other extracurricular activities.

(b) The academy is a coeducational program for selected Texas high school students with an interest in and the potential to excel in mathematics and science studies. The academy shall admit only high school juniors and seniors, except that the academy may admit a student with exceptional abilities who is not yet a high school junior. The board shall set aside adequate space at the new university to operate the academy and implement the purposes of this section. The academy must operate on the same fall and spring semester basis as the university. Full-time students of the academy must enroll for both the fall and spring semesters. Faculty members of the university shall teach all academic classes at the academy. A student of the academy may attend a college course offered by the university and receive college credit for that course.

(c) The university administration has the same powers and duties with respect to the academy that the administration has with respect to the university. The board, in consultation with university administration, shall:

(1) establish an internal management system for the academy and appoint an academy principal, who serves at the will of the board and reports to the vice president for academic affairs;

(2) provide for one or more academy counselors;

(3) establish for the academy a site-based decision-making process similar to the process required by Subchapter F, Chapter 11, that provides for the participation of academy faculty, parents of academy students, and other members of the community; and

(4) establish an admissions process for the academy.

(d) The student-teacher ratio in all regular academic classes at the academy may not exceed 30 students for each classroom teacher,

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except that the student-teacher ratio may exceed that limit:

(1) in a program provided for the purposes prescribed by Subsection (a)(2) or another special enrichment course or in a physical education course;

(2) if the board determines that a class with a higher student-teacher ratio would contribute to the educational development of the students in the class; or

(3) if an academy class is combined with a university class with more than 30 students.

(e) The academy shall provide the university-level curriculum in a manner that is appropriate for the social, psychological, emotional, and physical development of high school juniors and seniors. The administrative and counseling personnel of the academy shall provide continuous support to and supervision of students.

(f) For each student enrolled in the academy, the academy is entitled to allotments from the foundation school fund under Chapter 42 as if the academy were a school district without a tier one local share for purposes of Section 42.253. If in any academic year the amount of the allotments under this subsection exceeds the amount of state funds paid to the academy in the first fiscal year of the academy's operation, the commissioner of education shall set aside from the total amount of funds to which school districts are entitled under Section 42.253(c) an amount equal to the excess amount and shall distribute that amount to the academy. After deducting the amount set aside and paid to the academy by the commissioner of education under this subsection, the commissioner of education shall reduce the amount to which each district is entitled under Section 42.253(c) in the manner described by Section 42.253(h). A determination of the commissioner of education under this subsection is final and may not be appealed.

(g) The board may use any available money, enter into contracts, and accept grants, including matching grants, federal

grants, and grants from a corporation or other private contributor, in establishing and operating the academy. Money spent by the academy must further the purposes of the academy under Subsection (a).

(h) The liability of this state under Chapters 101 and 104, Civil Practice and Remedies Code, is limited for the academy and employees assigned to the academy and acting on behalf of the academy to the same extent that the liability of a school district and an employee of the school district is limited under Sections 22.0511, 22.0512, and 22.052 of this code and Section 101.051, Civil Practice and Remedies Code. An employee assigned to the academy is entitled to representation by the attorney general in a civil suit based on an action or omission of the employee in the course of the employee's employment, to limits on liability, and to indemnity under Chapters 104 and 108, Civil Practice and Remedies Code.

(i) Except as otherwise provided by this section, the academy is not subject to the provisions of this code or to the rules of the Texas Education Agency regulating public schools.

SECTION 2. CONFORMING AMENDMENT. Subsection (a), Section 74.751, Education Code, is amended to read as follows:

(a) The board of regents of The University of Texas System may operate The University of Texas Health Science Center--South Texas as provided by Section 79.02, ~~[a component institution of The University of Texas System]~~ with its ~~[main campus and]~~ administrative offices to be located in Hidalgo and Cameron Counties [County]. The health science center shall ~~[may]~~ consist of a medical school, as provided by Section 74.752, other health and health-related degree programs, and related programs and facilities as the board considers appropriate.

SECTION 3. CONFORMING AMENDMENT. Section 74.752, Education Code, is amended to read as follows:

Sec. 74.752. MEDICAL SCHOOL. The medical school ~~[If The~~

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~~University of Texas Health Science Center--South Texas is established under Section 74.751, The University of Texas Medical School--South Texas may be]~~ established as a component of the health science center and as a component institution of The University of Texas System under the management and control of the board of regents of The University of Texas System is subject to this section. The offices overseeing undergraduate medical education shall be located in Hidalgo County and the offices overseeing graduate medical education shall be located in Cameron County. The board shall ensure that educational programs for first-year and second-year students shall be primarily located in Hidalgo County, and the educational programs for third-year and fourth-year students shall be primarily located in Cameron County; and the educational programs for all medical students shall take full advantage of the existing educational facilities and programs at The University of Texas--Pan American's Edinburg campus or successor campus, The University of Texas at Brownsville campus or successor campus, and the Lower Rio Grande Valley Academic Health Center established under Subchapter L, Chapter 74, in Harlingen and Edinburg. Graduate medical education programs and activities shall be conducted throughout the region.

SECTION 4. THE UNIVERSITY OF TEXAS--PAN AMERICAN AND THE UNIVERSITY OF TEXAS AT BROWNSVILLE ABOLISHED. (a) The University of Texas--Pan American and The University of Texas at Brownsville are abolished on a date the board of regents of The University of Texas System determines appropriate to achieve the maximum operating efficiency of the system. The designated date must be entered into the minutes of the board. The board shall take all actions necessary to provide for an orderly windup of the affairs of each university.

(b) The board shall provide to the secretary of state written notice of its action under Subsection (a) of this section. Effective on the date the board designates for the abolition of the institutions described by Subsection (a) of this section, Chapters 77

and 78, Education Code, are repealed.

(c) The board may not act under Subsection (a) of this section to abolish The University of Texas--Pan American and The University of Texas at Brownsville earlier than the date on which the university created under Chapter 79, Education Code, as added by this Act, begins operation.

SECTION 5. UNIVERSITY CREATED. (a) The university described by Chapter 79, Education Code, as added by this Act, is created within The University of Texas System. As provided by that chapter, the board of regents of the system shall name the university and establish the university as a general academic teaching institution offering the degrees authorized by that chapter.

(b) The university shall begin operating on a date the board of regents determines appropriate to achieve the maximum operating efficiency of the system. The designated date must be entered into the minutes of the board.

(c) In recognition of the abolition of The University of Texas--Pan American and The University of Texas at Brownsville as authorized by this Act, the board of regents shall facilitate the employment at the university created by this Act of as many faculty and staff of the abolished universities as is prudent and practical.

(d) A student admitted to or enrolled at The University of Texas--Pan American or The University of Texas at Brownsville on the date of abolition is entitled to admission to the university created by this Act, and the board shall take actions necessary to facilitate that admission and the appropriate transfer of credits.

(e) Until such time as the university created by this Act formally begins operation, the board of regents may provide for The University of Texas--Pan American or The University of Texas at Brownsville to use any facilities under the management and control of The University of Texas System, including facilities developed for the university created by this Act. In addition, the board may lease

or purchase facilities owned by Texas Southmost College District or by other owners to the extent the board determines necessary and practical.

(f) This Act does not affect the powers, duties, and obligations of The University of Texas at Brownsville and the Texas Southmost College District under Section 5, Chapter 935 (Senate Bill No. 1909), Acts of the 82nd Legislature, Regular Session, 2011. As provided by that law, that university and the district shall continue a partnership agreement in effect until August 31, 2015, to the extent necessary to ensure accreditation.

SECTION 6. EFFECTIVE DATE. This Act takes effect immediately if it receives a vote of two-thirds of all the members elected to each house, as provided by Section 39, Article III, Texas Constitution. If this Act does not receive the vote necessary for immediate effect, this Act takes effect September 1, 2013.

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