



OFFICE OF SUPPLIER DIVERSITY STRATEGIC PLAN 2017-18

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OBJECTIVE

The University of South Florida (USF System) is committed to utilizing diverse businesses in the procurement of goods, services, and construction contracts. The USF System continues to actively pursue diverse businesses for contracting opportunities and is committed to serving the university and surrounding business community through educational and community outreach activities.

The objective of the 2017-18 Strategic Plan is to outline how the Office of Supplier Diversity will lead the efforts in the implementation of the University's pro-active diverse supplier business strategy by focusing on several key implementation components including policy development, marketing and communications plan development, establishing data analytics and tracking, program budget, incremental program goal setting, and finally program metrics and expectations. By putting these key program components in place, an environment conducive to providing all suppliers, regardless of size, equal access to sourcing and purchasing opportunities and will further encourage the utilization of diverse suppliers including women-, minority- and veteran-owned business enterprises.

DIVERSE BUSINESS TARGET MARKET

The target market of the **USF Office of Supplier Diversity (USFOSD)** include businesses owned by women, minorities and veterans. Local businesses in these categories are preferred. Other target areas include all USF departments, academic units, and prime contractors who actively represent the USF System in the business community through involvement in business associations and organizations.

The following business types are included in the USF Supplier Diversity Program:



- **Minority Owned**

Business: A business that is at least 51% owned by an individual(s) who is Black American, Hispanic American, Native American, Asian-Pacific American, or Subcontinent-Asian American.

Source: <http://www.NMSDC.org/NMSDC>.

- **Disadvantaged Business Enterprise:** A business that is at least 51% owned by an individual(s) who the federal government considers to be socially and

economically disadvantaged, that has its management and daily operation controlled by such an individual(s), and whose owner(s) net worth, excluding equity in the business and primary residence, does not exceed \$750,000. Black Americans, Hispanic Americans, Native Americans, Asian-Pacific Americans, Subcontinent-Asian Americans, as well as any others who believe they are socially and economically disadvantaged may qualify. The federal government requires that companies claiming Small Disadvantaged Business status must be certified by the U.S. Small Business Administration.

Source: www.sba.gov.

- **Women Owned Business:** A business that is at least 51% owned by one or more women, and whose management and daily operations are controlled by one or more women. In the case of publicly owned businesses, at least 51% of the stock must be owned by non-minority women.
Source: <http://www.wbenc.org/>.
- **Veteran Owned Business:** A business that is at least 51% owned by one or more veterans or, in the case of any publicly owned business, not less than 51% of the stock of which is owned by one or more veterans and the management and daily business operations of which are controlled by one or more veterans.
Source: <http://www.vetbiz.gov/>.
- **Service Disabled Veteran Owned Business:** Is a business that is at least 51% owned by one or more service-disabled veterans or, in the case of any publicly owned business, not less than 51% of the stock of which is owned by one or more service-disabled veterans, and the management and daily business operations of which are controlled by one or more service disabled veterans or in the case of a permanent and severe disability, the spouse or permanent caregiver of such veteran.
Source: <http://www.vetbiz.gov>.

CALL TO ACTION

The **USF System Office of Supplier Diversity (USFOSD)** Assistant Vice President along with Executive Level Administration has issued a “Call to Action” to increase the utilization of diverse businesses across the USF System. This increase will be achieved by working with all USF System Purchasing Agents, Departmental Buyers, Facilities Planning and Construction Department (FPC), all PCard holders and the University of South Florida Supplier Diversity Advisory Committee.

WHAT IS THE DESIRED OUTCOME?

The desired outcome of this strategic plan is to create a roadmap in developing a systematic program administered by the **USFOSD** to increase awareness across the USF System about the importance and benefits of utilizing diverse suppliers in university procurements of goods, services, and construction. The category of designated diverse suppliers include women-, minority, and veteran-owned business enterprises.

WHERE ARE WE NOW?

The University of South Florida is a large, public 4-year university offering undergraduate, graduate, specialist and doctoral level degrees. The USF System includes three, separately accredited institutions: USF; USF St. Petersburg; and USF Sarasota-Manatee. Serving more than 49,000 students, the USF System has an annual budget of \$1.6 billion and is ranked 41st in the nation for research expenditures among all universities, public or private.

USF is comprised of 14 colleges offering more than 180 undergraduate majors and concentrations; with some of the most populated colleges being USF Health, Arts & Sciences, Business and Engineering. There are also numerous degree programs at the graduate, specialist and doctoral levels, including the doctor of medicine. USF prides itself on being a high-impact global research university dedicated to student success.

USF St. Petersburg offers an intimate, waterfront campus environment with smaller classes and an emphasis on community engagement. It offers more than 40 graduate and undergraduate programs in the Colleges of Arts and Sciences, Business and Education.

USF Sarasota-Manatee similarly offers a smaller, personalized learning setting while its scenic campus is an important piece of Sarasota's Cultural Corridor. It offers over 40 academic programs with four main dynamic colleges in Business, Hospitality & Tourism Leadership, Liberal Arts & Social Sciences, and Science & Mathematics.

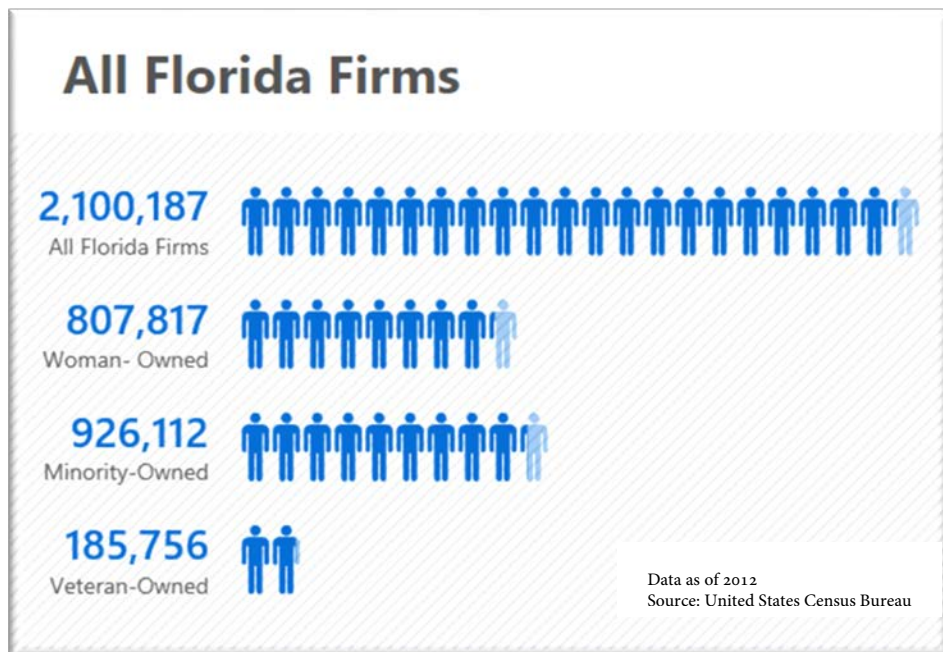


From a demographic standpoint, the USF System is a very diverse university with 40.6% of its students being African American, Black, Asian American, Hispanic, Native American or multiracial. The makeup of the business community in the Tampa Bay Region is very diverse. According to the US Census Bureau as of 2012 there are a total of 2.1 million firms in the state of Florida with more than 800 thousand of those firms being women-owned business enterprises, 926 thousand minority-owned business enterprises and 185 thousand veteran-owned business enterprises.

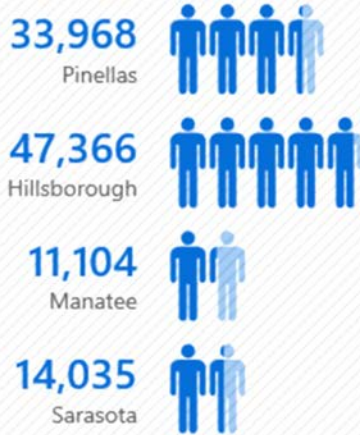
According to the United States Census Bureau, business ownership is defined as having 51 percent or more of the stock or equity in the business and is categorized by:

- Gender: Male; female; or equally male/female.
- Ethnicity: Hispanic; equally Hispanic/non-Hispanic; non-Hispanic.
- Race: White; Black or African American; American Indian or Alaska Native; Asian; Native Hawaiian or Other Pacific Islander; or some other race.
- Veteran status: Veteran; equally veteran/nonveteran; nonveteran.
- Publicly held and other firms not classifiable by gender, ethnicity, race, and veteran status

A snapshot of the diverse business make-up in the main footprint of the USF System; Hillsborough County, Pinellas County, Manatee County and Sarasota County, is represented below.

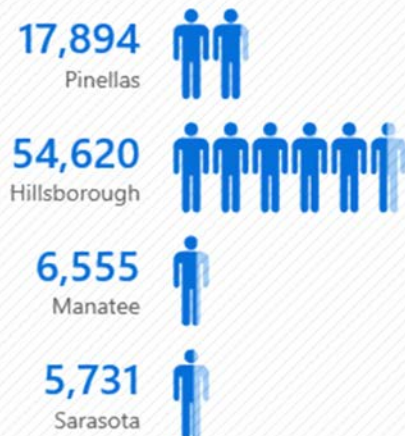


Women-Owned Firms by County

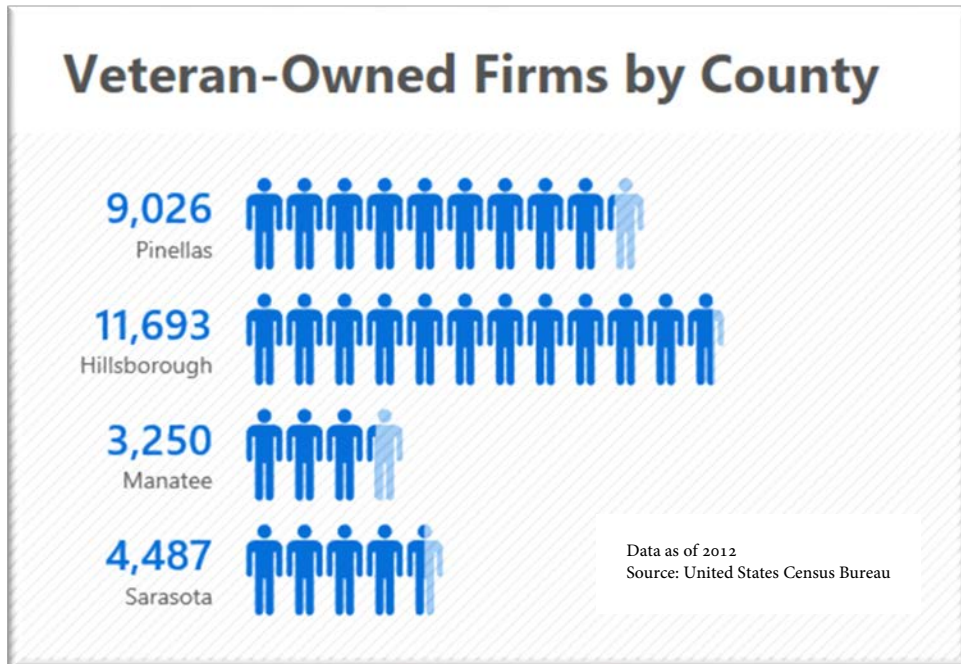


Data as of 2012
Source: United States Census Bureau

Minority-Owned Firms by County



Data as of 2012
Source: United States Census Bureau



SWOT ANALYSIS

In an effort to assess the USF supplier diversity initiatives, the University of South Florida’s Supplier Diversity Advisory Committee actively participated in a SWOT Analysis to identify areas of improvement and strategic development as it relates to supplier diversity system wide. The feedback provided by the committee includes detailed comments and suggestions to assist the **USFOSD** in further program implementation. For complete details of the **USFOSD** SWOT Analysis, please see **Appendix A, Section 3**.

USFOSD ADVISORY COMMITTEE

The University of South Florida Supplier Diversity Advisory Committee was established in early 2017 to assist in hiring an Assistant Vice President of Supplier Diversity to champion the supplier diversity efforts across the USF System.

On April 17, 2017, the selected candidate began employment with the USF System and continues to work with the **USFOSD** Advisory Committee to establish a foundation for program growth and overall success.

The University of South Florida Supplier Diversity Advisory Committee meets regularly and is comprised of USF Administration, Faculty and Staff. A full listing of the current advisory committee members can be found at www.usf.edu/osd.

This advisory committee is comprised of USF employees only but as needed may consult with or engage supplier diversity field experts or consultants to assist in advising the USF Office of Supplier Diversity on specific matters. While these consultants or facilitators may act as a source of information or catalyst for change, the leadership process remains solely with the USF Supplier Diversity Advisory Committee.

WHERE ARE WE GOING?

There are many components that comprise a successful supplier diversity program. Key elements that will contribute to the success of the USF Supplier Diversity program will include working directly with purchasing to understand university spend system wide, creation of a diverse supplier portal that will assist USF System employees with purchasing authority find vendors to utilize when procuring goods, services, and construction.

It will also be essential to create a marketing and communications plan to communicate supplier diversity initiatives internally and externally to all USF Faculty, Administration, Staff and external suppliers at all levels including 2nd tier suppliers. Other contributors to program success include creating educational tools and business development resources to assist businesses in preparing to add value with their service offerings to the USF system. Finally, monitoring and tracking program performance will be essential to providing insight to the **USFOSD** on areas of focus.

Ultimately, the vision for the **USFOSD** is to formulate a strategic organization that will increase the utilization of diverse businesses system wide and create a program within the next 5 years that will include the Assistant Vice President of Supplier Diversity and a fully staffed team inclusive of business development and data analytics professionals.

HOW WILL WE GET THERE?

The USF Board of Trustees Strategic Initiatives Committee (SIC) has recommended that the “Best Practices” in minority supplier development outlined by the National Minority Supplier Development Council Inc.® (NMSDC®) be “officially” imbedded in the fabric of the strategic plan for the USF Office of Supplier Diversity.

The NMSDC® is one of the country’s leading corporate membership organizations whose mission is to advance business opportunities for certified minority business enterprises and connect them to their corporate members by working through their NMSDC®

network to support and facilitate MBE integration into corporate and public sector supply chains and build MBE capacity and capabilities through their programs and other educational offerings.

Although the NMSDC® focuses on minority owned businesses specifically, some of the key principles and best practices that the SIC related to, also apply to women- and veteran-owned business enterprises alike.

The NMSDC® eight best practices referred to by the SIC are referenced throughout this document (in no particular order) and are listed below:

NMSDC® 8 Recommended Best Practices for Supplier Diversity Programs:

1. Establish corporate policy and top management support
2. Develop a corporate minority supplier development plan
3. Develop comprehensive internal and external communications
4. Identify opportunities for diverse owned businesses in strategic sourcing and supply chain management
5. Establish a comprehensive minority supplier development process
6. Tracking, reporting and goal setting mechanisms
7. Establish a continuous improvement plan
8. Establish a Tier 2 program

Aside from the recommendations of the NMSDC®, there are many other pertinent “implementation components” that go into developing a successful supplier diversity program. Defined in the following sections of the strategic plan are strategies that have been identified and recommended by the leadership of the **USFOSD** to narrowly tailor the USF Supplier Diversity program to meet the specific needs of the University of South Florida System keeping in mind that the goals of the university’s supplier diversity initiatives must align with the USF system wide goals of:

1. Affording student access, learning, and success through a vibrant, interdisciplinary, and learner-centered research environment incorporating a global curriculum;
2. Providing an environment in which research and scientific discovery strengthens the economy, promotes civic culture and the arts, and to design and build sustainable communities through the generation, dissemination, and translation of new knowledge across all academic and health-related disciplines;
3. Establishing partnerships that assist in building significant locally- and globally-integrated university-community collaborations through sound scholarly and artistic activities and technological innovation; and
4. Fostering a sustainable economic base to support USF's continued academic advancement.

POLICY DEVELOPMENT

(REFERENCING NMSDC® GOAL 1 – ESTABLISH CORPORATE POLICY AND TOP MANAGEMENT SUPPORT)

The following policy has been developed and is pending approval from USF System leadership that defines the primary objectives of the USF System Supplier Diversity Program and defines the benefits of the program for the university, the employees and community stakeholders. It is essential that this policy is endorsed by top level leadership including USF President, Board of Trustees, Chief Operating Officer and Chief Financial Officer.



Suggested Language for USF System Supplier Diversity Policy:

As the University of South Florida continues to grow, greater business opportunities exist for minority-, women- and veteran-owned business enterprises. We believe that forging lasting relationships with a diverse supplier base contributes to economic progress, and strengthens our community.

*In an effort to continually promote the participation of diverse business across the USF System, the following policy has been established and is effective **(TBD)**.*

All USF System Administration, Faculty & Staff are required to make a “good faith” effort in the utilization of diverse which includes minority-, women- and veteran-owned businesses in all sourcing initiatives and purchasing events at all levels including PCard purchases to assist the USF System in increasing actual spend with diverse owned suppliers. To gauge diverse business utilization system wide, spend reports by department and individual PCard spend will be monitored and reported to the USF President’s Office semi-annually.

*In addition, standard boilerplate diverse business utilization language **(Appendix G)** is required to be included in all USF contracts system wide in the purchase of any goods, professional services, supplies or construction services.*

This initiative benefits the university, our employees and community stakeholders by creating competition which drives higher quality products, a larger variety of selections and better pricing. It also creates a platform for job creation, workforce diversity and overall economic growth in the footprint of the USF System.

In an effort to support this policy, the USF Office of Supplier Diversity has been established and is available to assist system wide in support of this initiative.

Good Faith Effort Defined: USF defines a “good faith effort” as being what a reasonable person would determine is a diligent and honest effort under the same set of facts or circumstances." Target date for policy implementation system wide is January 1, 2018.

MARKETING AND COMMUNICATIONS PLAN DEVELOPMENT

(REFERENCING NMSDC® GOAL 3 – DEVELOP COMPREHENSIVE INTERNAL AND EXTERNAL COMMUNICATIONS)

In an effort to promote the **USFOSD**, a 2017-18 Marketing and Communications Plan has been developed (**Appendix A**) that encompasses the strategy, schedule and outline that will be utilized to promote the USF Supplier Diversity program internally and externally.

The plan will be reviewed and updated as an ongoing strategy of the University Communications and Marketing team so the supplier diversity initiatives are imbedded in the overall USF branding strategy ongoing.

From an internal standpoint, this includes communication to help internal USF Administration, Faculty and Staff understand the importance of the program and the importance of their participation. From an external standpoint, the USF Office of Supplier Diversity is charged with communicating to USF suppliers about the University's commitment to use diverse suppliers but also communicating that we are looking for best value, quality and service that will benefit the university as a whole.



This plan also references a strategy to retool the **USFOSD** website, collateral materials and the launch of a new social media platform which will include Twitter and Facebook. This strategy also includes media buys (broadcast, print and television) to engage the diverse business community and communicate the vision and mission of the program.

These strategies, once implemented, will serve as a communications tool for the diverse business community who is looking for additional information on opportunities and how to do business with USF. Also available will be information on upcoming events, industry information and will serve as a clearinghouse for other information available to aid in business growth.

Internal USF Faculty, Administration and Staff can use the aforementioned resources to learn more about supplier diversity and to find qualified vendors to use in their procurement efforts.

The Office of Supplier Diversity will continuously work in conjunction with the University Communications and Marketing team to ultimately plan and implement this marketing and communications strategy.

DATA ANALYTICS AND TRACKING

(REFERENCING NMSDC® GOAL 8 – ESTABLISH A SECOND TIER PROGRAM)

In conjunction with USF Purchasing, actively procure and/or develop a spend analytics tool to gauge actual spend and track contract compliance with diverse suppliers on all system contracts and sourcing events. This system will assist the **USFOSD** in developing solutions for establishment of a second tier supplier program as USF moves to a strategic sourcing platform and enable the tracking of key considerations as program success is measured. Key system components should include the following:

- User-friendly design with a reporting format that allows Tier 1 suppliers to report Sub-contractor/Tier 2 utilization
- Ability to upload diverse spend data directly into system
- Ability to validate Tier 1 and Tier 2 Supplier certification status
- Ability to capture and view data by colleges and department purchases by category
- Capability to conduct contract compliance audits verifying supplier spend detail

SHORT, MID, AND LONG TERM PROGRAM GOALS

(REFERENCING NMSDC® GOAL 6 – ESTABLISH TRACKING AND REPORTING AND GOAL SETTING MECHANISMS & NMSDC® GOAL 7 – ESTABLISH A CONTINUOUS IMPROVEMENT PLAN)

Creation of specific short-, mid-, and long-term program goals are key to the success of any program implementation. These goals are essential for program implementation and include educational tools and resources and the utilization of incentives to drive system wide program success. These goals also assist in identifying continuous program improvements as development progresses.

The following section of the 2017-18 **USFOSD** Strategic Plan identifies short-term, mid-term and long term program goals and objectives.

Short-term (0-12 Months)

USFOSD Short term goals (listed numerically below) are goals that will be accomplished within the first 12 months of program implementation. The purpose of these short term goals are to establish a programmatic foundation on which to build upon continuously over the next 5 years throughout program development.

The following short term goals have been established for the **USFOSD**.

1. AVP - Understanding USF General Business Processes - TAMPA

2. AVP - Understanding USF General Business Processes
- SARASOTA
3. AVP - Understanding USF General Business Processes
- ST. PETERSBURG
4. AVP - FAST Training
5. AVP - RAPID Training
6. AVP - PCard Training
7. USF Office of Supplier Diversity Strategic Plan
Development
8. USF Office of Supplier Diversity General Budget
Development
9. Identification of Staffing Needs (USF System) Budget
Development
10. Begin Hiring **USFOSD** Dedicated FTEs based on
Identified Staffing Needs (Organizational Development)
11. Launch PCard Training to Build Program Awareness
12. Development of OSD Office Presentations for Community Outreach
13. Agency Rebrand w/UCM
14. Website (Design and Content Development)
15. Marketing and Collateral Material
16. Social Media Campaign Development
17. Design and Brand Tradeshow Exhibit Display
18. Design and Brand OSD Logo in conjunction with USF Mkt. & Comm.
19. Design OSD Apparel and Promotional Items for Internal & External
20. Identify & Meet with USF Stakeholder in areas of opportunity for XBE Utilization
21. Develop Spend Data Collection and Analytic Procedure in conjunction with
Purchasing
22. Development of a Diverse Supplier Portal (Certified XBEs Only)
23. Development and Launch of Lunch & Learn Supplier Diversity Series
24. Development and Launch of a "How to do Business with USF Series"
25. Establish Partnerships USF System Wide for Proper Project Management in all
Categories
26. Establish SD Project Management Guidelines for Major USF Projects



For full outline of short-term goals and tie to SWOT, see **Appendix C**

Mid-term (1-3 Years)

USFOSD Mid-term goals (listed numerically below), have been identified and are achievable and specific. The implementation of the mid-term goals included in this plan require a financial commitment from the USF System and may take some time to ultimately achieve.

The USF System Administration has committed to establishing a dedicated program and the following mid-term goals to assist in the further implementation of a fully successful supplier diversity program.

1. Establish USF Employee Award & Recognition Program
2. Complete Hiring **USFOSD** Dedicated FTEs based on Identified Staffing Needs (Organizational Development)
3. Train and Develop **USFOSD** Staff
4. Begin Procurement/Development of Data Analytics Tool to Track XBE Spend (Tier 1 & Tier 2)
5. USF Office of Supplier Diversity Strategic Plan Review & Update (Current Year)
6. USF Office of Supplier Diversity General Budget Review & Update (Current Year)
7. Implementation of Educational Series for Emerging Businesses (Possibly Kauffman Series)
8. Grow Available USF Diverse Suppliers
9. Identify & Meet with USF Stakeholder in Areas of Opportunity for XBE Utilization*
10. General Program Management and Community Relations
11. Agency Brand Maintenance:
12. Website (Design and Content Development)
13. All Marketing and Collateral Material
14. Social Media Campaign Development
15. Design and Brand Tradeshow Exhibit Display
16. Design and Brand OSD Logo in conjunction with USF Mkt. & Comm.
17. Design OSD Apparel and Promotional Items for Internal & External

For full outline of mid-term goals and tie to SWOT, see **Appendix D**

(*REFERENCING NMSDC® GOAL 4 – IDENTIFY OPPORTUNITIES FOR DIVERSE OWNED BUSINESSES IN STRATEGIC SOURCING AND SUPPLY CHAIN MANAGEMENT)

Long Term (3-5 Years)

Strategic long-term objectives (listed numerically below), represent continuous strategic areas that have been identified to assist the **USFOSD** implement and continuously improve the programming and vision of increasing the utilization of women-, minority-, and veteran-owned businesses in the procurement of goods, services, and construction and will help the USF System achieve its commitment to serve the university and surrounding business community through the provision and participation of educational and community outreach activities.

These strategic long term objectives also strengthen collaboration and alignment amongst state, regional, and local entities fostering supplier diversity and business development initiatives. This will assist the USF System in becoming a trailblazer in supplier diversity amongst higher education institutions and will contribute to the state

of Florida's efforts in continuing as one of the nation's top performing economies. It is important for the **USFOSD** to effectively establish collaborative partnerships amongst private, public, and nonprofit sectors and organizations responsible for business development, workforce, education, research, transportation, energy, community planning, housing, environmental protection, water, health services, and many other related areas.

The following long-term goals have been established for the **USFOSD**.

1. Fully Operational SD Program, Fully Staffed Across USF System
2. Formal USF System Disparity Study (In Conjunction w/State of FL)
3. Facilities, Planning & Construction Mentor Protégé Program
4. Maintenance of Diverse Supplier Portal (Certified XBEs Only)
5. Continued Implementation of Lunch & Learn Supplier Diversity Series
6. Implementation of Data Analytics Tool to Track XBE Spend (Tier 1 & Tier 2)
7. USF Office of Supplier Diversity Strategic Plan Review & Update (Current Year)
8. USF Office of Supplier Diversity General Budget Review & Update (Current Year)
9. Continuation of Full Educational Series for Emerging Businesses - (Supplier Development Program)*
10. Grow Available USF Diverse Suppliers
11. General Program Management and Community Relations
12. Identify & Meet with USF Stakeholder in Areas of Opportunity for XBE Utilization

(*REFERENCING NMSDC® GOAL 2 – DEVELOP A CORPORATE MINORITY SUPPLIER DEVELOPMENT PLAN & NMSDC® GOAL 5 ESTABLISH A COMPREHENSIVE MINORITY SUPPLIER DEVELOPMENT PROCESS)

For full outline of long-term goals and tie to SWOT, see **Appendix E**. All goals are projected and subject to change as the programs of the **USFOSD** develop.

BUDGET

The **USFOSD** budget is a compilation of pertinent items that the **USFOSD** will use to support system wide supplier diversity efforts including internal and external marketing and program promotion, communication, outreach and business education programming expenses. This budget is under development and will be need approval by top USF leadership.

KEY CONSIDERATIONS

(REFERENCING NMSDC® GOAL 6 – ESTABLISH TRACKING AND REPORTING AND GOAL SETTING MECHANISMS)

The Billion Dollar Roundtable (BDR) was created in 2001 to recognize and celebrate entities that achieved spending of at least \$1 billion with minority and woman-owned suppliers. The BDR promotes and shares best practices in supply chain diversity excellence through the production of white papers. In discussions, the members review common issues, opportunities and strategies and encourages the continual growth of diverse suppliers by analyzing and when appropriate increasing their spend levels.

The BDR has several key considerations that shape supplier diversity initiatives and their recommendations below will be utilized to shape the performance of the USF Supplier Diversity Program.

1. Close integration with purchasing including strategic sourcing initiatives.
2. Annual objectives coupled with quarterly reports.
3. Expanding reach of performance metrics to increase accountability among team members.
4. Executive leadership support and involvement.
5. Establishment of supplier diversity with system wide purchasing.
6. Accountability for achieving year-over-year supplier diversity objectives at all levels of the purchasing organization.
7. Frequent review of supplier diversity performance against objectives.

What are our annual objectives?

1. Increased spend with diverse suppliers at the outset of the program and then \$ and % increase on annual basis. The national average for diverse business spending within organizations who have focused supplier diversity initiatives falls in the range of approximately 13% - 20% according to the Atlanta based Hackett Group Supplier Diversity Report. This will be the target range for USF's total addressable spend upon full program implementation.
2. Increased percentage and actual number, year over year, of diverse suppliers that submit bid responses on opportunities let by purchasing.
3. Increased percentage and number of diverse suppliers that formally debrief with USF Purchasing after bid award.
4. Increased percentage and number of diverse suppliers participating/attending pre-bid meetings for capital projects.
5. Provision of relevant educational tools and resources for diverse suppliers.
6. Increased number of USF departments participating in the supplier diversity program.
7. Increased support of Tier 1 suppliers in Tier 2 purchasing activities through focused relationship-building activities.

SUMMATIVE STATEMENT

Supplier diversity and inclusion on all levels creates a climate of economic development. It is our responsibility as a major educational institution to champion diversity and be the leader in creating a culture of inclusiveness. It is important that all businesses have an opportunity to participate in the procurement efforts system wide and those who hold purchasing authority on behalf of the USF System must understand the value of creating an environment that levels the playing field so all businesses can successfully compete for USF System procurements. Supplier diversity and inclusion is not just something being implemented to meet a contract goal, it's the right thing to do.

We are better because of our differences not despite of them and the **USFOSD** is committed; as the leader of the USF System's supplier diversity initiatives, to ensure those differences are celebrated and all businesses within the Tampa Bay Region have an opportunity to grow due to the efforts of the University of South Florida. The inherent success of this program and the strategic initiatives outlined in this plan are directly connected to the commitment of all USF System Administration, Faculty and Staff and by working together as a team, the University of South Florida will become an industry leader in supplier diversity initiatives amongst higher education institutions.

APPENDICIES

APPENDIX A- MARKETING AND COMMUNICATIONS PLAN

University of South Florida Department:	Controller's Office	Program Name:	USF Office of Supplier Diversity
Program Contact:		Terrie Daniel, Assistant Vice President Phone: 813-974-6260 Email: tfdaniel@usf.edu	
<p>1. Executive summary: This section contains a brief summary of the key elements of the overall plan for the University of South Florida's Office of Supplier Diversity and ideas that are core to the success of the plan.</p>		<p>The University of South Florida (USF System) is committed to utilizing diverse businesses in the procurement of goods, services, and construction contracts. The USF System continues to actively pursue diverse businesses for contracting opportunities and is committed to serving the university and surrounding business community through educational and community outreach initiatives.</p> <p>The University of South Florida's Office of Supplier Diversity (USFOSD) was established to spearhead the university supplier diversity initiatives and to accomplish this goal, the USFOSD plans to:</p> <ul style="list-style-type: none"> ▪ Partner with state agencies, SEIs, non-profit and for profit organizations that support the development and growth of diverse businesses across the state of Florida. ▪ Sponsor and attend relevant Supplier Diversity tradeshows business development workshops, regional business conferences and outreach events locally and nationally. ▪ Act as the main conduit to internal USF System Administration, Faculty and Staff as well as external partners and constituents to provide information and resources relative to USF opportunities and utilization of diverse using an e-marketing web 	

	<p>based platform as well as print publications and internal communication modes.</p>
<p>2. Background and rationale of plan: This section provides background program information and the intended purpose of the USF Office of Supplier Diversity.</p>	<p>The USFOSD is housed in the University Controller’s Office under the direction of an Assistant Vice President. The Assistant Vice President works closely with the USF System Purchasing Agents, Departmental Buyers, and the Facilities, Planning and Construction Department (FPC). The Assistant Vice President is responsible for monitoring, implementing, progress tracking and adjustments to the University’s diverse business utilization plan.</p> <p>This marketing and communications plan is designed to assist the University of South Florida System in:</p> <ul style="list-style-type: none"> ▪ Increasing the utilization of diverse businesses in University purchasing. ▪ Reaching more diverse firms across the state of Florida to build awareness regarding USF System procurement opportunities. ▪ Increasing the number of certified diverse firms doing business with the USF System. ▪ Increasing the awareness of the USF Supplier Diversity initiatives. ▪ Implementation of updated and improved system spend analytics in an effort to track progress. ▪ Providing diverse firms necessary tools to sustain and grow their businesses and be prepared to do business with the USF System.
<p>3. Situational SWOT analysis: This section outlines the potential strengths, weaknesses, opportunities or threats the</p>	<p>The USFOSD works in concert with the USF Supplier Diversity Advisory Committee. This committee is comprised of USF Administration, Faculty, and Staff and is interested in seeing an increase in the USF System utilization of diverse businesses. The committee was asked by the USF Assistant Vice President of Supplier Diversity to</p>

University of South Florida
Supplier Diversity Program faces.

provide feedback in the form of a SWOT Analysis specific to USF Supplier Diversity. The SWOT Analysis below contains the feedback provided by the Advisory Committee Members:

Strengths:

1. By and large, members of the USF System will buy into the goals of the supplier diversity initiative.
2. The initiative has strong support from the USF System President and the Board of Trustees.
3. Support from leadership.
4. Resources in place to focus on enhancing supplier diversity initiative.
5. Large Enterprise (financial resources, management resources).
6. Campus locations in nearby counties.
7. Support from Board & Executive Levels (strategic).
8. Partnerships with other universities.
9. Diverse population of employees and students.
10. Broad range of vertical markets within the University's eco-system.
11. Long term relationships with large suppliers.
12. Intellectual capital.
13. Access to technology and communication platforms.
14. The University is growing.

Weaknesses:

1. It is not clear how well the goals of the supplier diversity initiative have been communicated to USF St. Petersburg and USF Sarasota-Manatee.
2. The supplier diversity initiative will require additional staff resources, especially if the specific needs of USF St. Petersburg and USF Sarasota-Manatee are to be met.
3. The structure of contracts, in particular catering contracts, may make it difficult for smaller suppliers to be included.
4. Lack of training pertaining to supplier diversity (importance, benefits, etc.)
5. Information regarding available MWBEs, products/services offered, etc.

6. Limited focus on including MWBEs when seeking potential vendors/contractors.
7. Unfamiliarity with MWBEs product/service quality.
8. Large Enterprise (dispersed, hard to reach, slow to change).
9. No strategy (where is the comprehensive plan?)
10. Lack of clarity; no specified goals, measurements, dashboard.
11. No appreciation for enormity of the effort required to resolve.
12. No diversity of thought in the approach to resolution.
13. Ineffective management review and oversight.
14. Who is accountable?
15. Only passive engagement with spending community.
16. Lack of understanding when dealing with technology OEM community.
17. No engagement with prime contractor community.
18. Business barriers that may exclude some businesses from doing business within the USF System including but not limited to access to capital, bonding, lack of capacity, as well as workforce limitations.

Opportunities:

1. The USF System could become known as a model for supplier diversity.
2. For USF St. Petersburg, the initiative can help it establish a (stronger) relationship with South St. Petersburg, an area that has to a large extent been ignored by the university.
3. Create more dialogue at departmental meetings regarding supplier diversity.
4. Promote networking opportunities with potential MWBE vendors/contractors.
5. Provide opportunities for MWBEs to present products/services specific to departments.

6. Policies designed to motivate departments to engage MWBEs.
7. Create alliances, leverage common prime suppliers.
8. Initiate dialogue with technology OEM community; cultivate diversity in channel partner engagement.
9. Establish, cultivate and grow relationships with community organizations.
10. Target internal opportunity and grow supplier(s) to take advantage of such opportunities.
11. Acquire external thinking and consultation; expand thinking.
12. Establish a program that fosters relationships between large contractors and minority businesses.
13. Establish relationships with other universities; share and learn.
14. The program can offer many benefits for diverse firms looking to connect and do business with the University of South Florida.
15. The program can provide information to help minority-, women-, veteran-owned and service disabled veteran-owned business enterprises grow strong profitable businesses and expand Florida's economy.
16. Opportunity to establish connections and in some cases more formal agreements with the USF Small Business Development Center, the Florida State Minority Supplier Development Council, the Women's Business Enterprise Council, the Small Business Administration, the National Association of Women Business Owners, the State of Florida Office of Supplier Diversity, the City of Tampa, City of St. Petersburg, City of Sarasota and various other organizations and entities that support business development amongst diverse firms.
17. Diverse firms are eager to do business with the USF System and these firms, community and partner organizations are requesting assistance in understanding the USF System procurement process.
18. There are requests from diverse firms for information that can assist them in securing contracts with the USF System as well as an interest

in the formation of new partnerships with organizations that serve diverse businesses like the USF Small Business Development Center, the Florida State Minority Supplier Development Council, the Women's Business Enterprise Council, the Small Business Administration, the National Association of Women Business Owners, the State of Florida Office of Supplier Diversity, the City of Tampa, City of St. Petersburg, City of Sarasota.

Threats:

1. The narrow definition of diversity in terms of race, gender and veteran status may negatively impact the supplier diversity initiative. There is a growing belief among some within the USF System that economic diversity should play a role as well. For example, a white business owner from a poor family background who started their business after a spell of incarceration probably deserves to be considered more than a privileged woman owned business.
2. The fact that stakeholders are expected to report information that is already available within the purchasing department may lead to some of them seeing this as yet another example of administrative busy work. This is especially true for USF St. Petersburg and USF Sarasota-Manatee, which have far fewer administrative staff than USF Tampa.
3. The absence of a clear incentive structure for P-card holders as far as supplier diversity is concerned may make it difficult to ensure that the initiative gains full traction.
4. Too many external influences that are making USF reactive instead of being proactive as it relates to building the program.
5. The initiative may interfere with other supplier related initiatives, such as initiatives to strengthen relationships with alumni.
6. The supply/pool of qualified MWBEs.
7. Existing culture.
8. Competition.
9. Negative public image.

	<ul style="list-style-type: none"> 10. Changing demographics. 11. Social Media. 12. Political environment; economic conditions. 13. Funding and donations. 14. Legislative and regulative outcomes. 15. Limited pool of diverse suppliers. 16. Competitors (other businesses seeking same suppliers).
<p>4. Program objective: This section outlines the main objective of the USFOSD Program and defines our target audience.</p>	<p>Objective: The main objective of the USFOSD is to work closely with the USF System Purchasing Agents, Departmental Buyers, and the Facilities, Planning and Construction Department (FPC) to increase the utilization of diverse businesses in University procurement initiatives. In addition, the Assistant Vice President is responsible for monitoring, implementing, progress tracking and adjustments to the University’s diverse business utilization plan.</p> <p>Target Audience:</p> <ul style="list-style-type: none"> ▪ Women-, minority- and veteran-owned businesses throughout the State of Florida. The program is administered by hosting events and programs in the Tampa, St. Petersburg, Sarasota and surrounding areas. ▪ Prime contractors and contractors who hold USF continuing service agreements as well as USF administration, faculty and staff who have purchasing authority.
<p>5. Position statement: This statement describes the USFOSD program focus and how it benefits our target audience.</p>	<p>The USFOSD works to continue the implementation of a proactive business strategy that provides all suppliers equal access to sourcing and purchasing opportunities. This affords the USF System access to vendors who are proving they can provide better pricing, products and service</p>

	<p>offerings than larger competitors in most cases. This helps USFs supply chain better reflect the demographics of our community and creates a platform for economic growth and development for the Tampa Bay Region.</p>
<p>6. Marketing strategies: This is a general outline of planned marketing and communication strategies for the USFOSD and how materials will be distributed.</p>	<p><u>Outreach Events</u></p> <p>The USFOSD will participate in supplier diversity trade shows and other outreach events that target the MBE, WBE and VBE communities. These events provide an opportunity for the USF System to promote the services and mission; the values and benefits of certification; and matchmaking opportunities between prime and subcontractors. The USFOSD informational brochure and upcoming bi-monthly newsletter publications will be available at tradeshow booths along with information about upcoming opportunities within the USF System. In addition, USFOSD staff will participate in national supplier diversity events and trainings to increase visibility and have a better understanding of what is trending across the country in supplier diversity, which could ultimately impact the program from a legal perspective.</p> <p><u>Educational Workshops</u></p> <p>The USFOSD will host workshops system wide to promote opportunities and more visibility into successfully submitting bids for USF System procurements. The USFOSD will also work with local organizations and partnering entities to offer and participate in workshops across Florida that provides educational training sessions to assist business owners in sustainability and growth efforts. In addition, the USFOSD in the future will utilize webinars to provide training content in an effort to reach larger</p>

audiences across the state of Florida in a more effective manner.

E-Newsletter

The **USFOSD** will develop an E-Newsletter to be distributed bi-monthly in an effort to provide up to date information on doing business with the University of South Florida System. It will also contain information on state resources, and **USFOSD** and partner workshops and outreach opportunities. We are currently looking at a few different platforms in which to disseminate the e-newsletter including GovDelivery, Constant Contact, Exact Target and Mail Chimp.

Social Media

The **USFOSD** has plans to develop Facebook and Twitter accounts to communicate relevant business opportunities, business development resources, and upcoming events to **USFOSD** followers.

Paid Advertisements

The **USFOSD** will work with the University Communications and Marketing department to research the most effective means to publish a series of ads promoting the program during the fiscal year. Our target for these paid advertisements will include all diverse business categories defined in by our “Diverse Business Target Market” outlined on page 2.

7. Implementation: This section outlines how the **USFOSD** will implement our plan and tie promotion strategies to objectives.

A calendar of proposed events has also been included to assist in the summarization of how the **USFOSD** plans to implement this plan.

The **USFOSD** has and continues to develop marketing collateral to expose Florida MBE, WBE and VBE firms to relevant supplier diversity information and resources that will assist them in growing their businesses. These initiatives facilitate relationships between prime contractors and certified subcontractors to assist the USF System in increasing the utilization of diverse businesses.

Special Events

Special events and trade shows will be paid for by the USF System however, an effort will be made by the **USFOSD** to engage private and corporate event sponsors. Press releases for each planned event will be disseminated to the media via the USF System Marketing and Communications Department and posted on the USF System calendar of events. Events will also be promoted in the **USFOSD** e-newsletter, social media accounts as well as to strategic partners across the state of Florida.

Resource Guides

A **USFOSD** resource guide is under development and will be printed for use at larger business development, tradeshow and outreach events.

Informational Brochure

A new **USFOSD** tri-fold brochure will be designed and printed for distribution at workshops and trade shows. About 5000 brochures are needed to support the full fiscal year of outreach events. NOTE: We currently have some brochures and will continue to utilize the current stock through FY17. As of FY18 all old brochures will be destroyed and the newly designed brochures will be used.

Promotional Items

The **USFOSD** will procure uniform shirts for staff to wear when participating in supplier diversity events. This creates uniformity and brand awareness to the business community and other supplier diversity professionals across the state of Florida. In addition a variety of promotional items will be procured to support internal employee educational programs.

Outreach Calendar

Preliminary listing of outreach events and workshops for FY17-18. Dates and events are subject to change.

August 2017

14 – Training for Top 100 PCard Users

22-27 – American Contract Compliance Association National Conference – Kansas City, Missouri

October 2017

6 –USF Supplier Diversity Day

20 - Training for Top 100 PCard Users (Overflow from 1st Session)

22-25 – National Minority Supplier Development Council National Conference – Detroit, Michigan

November 2017

15 - Lunch & Learn Series – USF Supplier Diversity Program and Why It’s the Right Thing to Do (Facilities)

December 2017

20 - OSD Goodie Drop (Colleges & Departments)

January 2018

17 - Lunch & Learn Series – USF Supplier Diversity Program and Why It’s the Right Thing to Do

February 2018

21 - Lunch & Learn Series – USF Supplier Diversity Program and Why It’s the Right Thing to Do (St. Petersburg Campus)

21 - Construction Vendor Outreach Event (St. Petersburg Campus)

March 2018

21 - Lunch & Learn Series – USF Supplier Diversity Program and Why It’s the Right Thing to Do (Sarasota-Manatee Campus)

21 - Professional Services Vendor Outreach Event (Sarasota-Manatee Campus)

April 2018

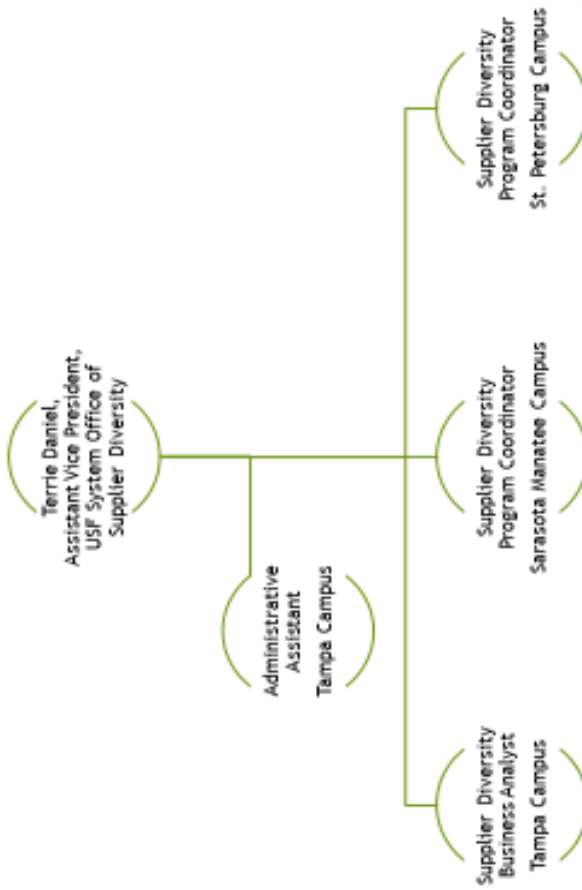
18 - Lunch & Learn Series – USF Supplier Diversity Program and Why It’s the Right Thing to Do

	<p>May 2018 16 - Lunch & Learn Series – USF Supplier Diversity Program and Why It’s the Right Thing to Do</p> <p>September 2018 Kick Off – USF Mentor Protégé’ Construction Program Kick Off – USF Construction Bond Readiness Program</p>
<p>8. Evaluation/Monitoring: This section outlines the Key Considerations that will be monitored to evaluate USF System Supplier Diversity program success.</p>	<p>Annual Program Objectives</p> <ul style="list-style-type: none"> ▪ Increased spend with diverse suppliers at the outset of the program and then \$ and % increase on annual basis. ▪ Increased number, year over year, of diverse suppliers that submit bid responses on opportunities let by purchasing. ▪ Increased number of diverse suppliers that formally debrief with USF Purchasing after bid award. ▪ Increased number of diverse suppliers participating/attending pre-bid meetings for capital projects. ▪ Provision of relevant educational tools and resources for diverse suppliers.
<p>9. Proposed marketing budget FY17-18</p>	<p>The USFOSD proposed budget has been submitted to USF leadership for approval.</p>

APPENDIX B – ORGANIZATIONAL CHART

University of South Florida Office of Supplier Diversity & Small Business Development*

(Note: This is the proposed organizational structure for the USF Office of Supplier Diversity and it is subject to structure and budget approval)



APPENDIX C – SHORT TERM GOALS

UNIVERSITY OF SOUTH FLORIDA OFFICE OF SUPPLIER DIVERSITY						
SHORT-TERM PROGRAM GOALS (0-12 MONTHS)						
PROJECT NAME	PROJECT TYPE	ESTIMATED START	ESTIMATED FINISH	ESTIMATED DURATION (DAYS)	*SWOT - Weaknesses	SWOT - Threats
Understanding USF General Business Processes - TAMPA	Administrative	4/17/2017	12/31/2017	254		
Understanding USF General Business Processes - SARASOTA	Administrative	4/17/2017	12/31/2017	254	1	
Understanding USF General Business Processes - ST. PETERSBURG	Administrative	4/17/2017	12/31/2017	254	1	
FAST Training	Administrative	4/17/2017	6/30/2017	73	4, 15	1
RAPID Training	Administrative	4/17/2017	6/30/2017	73	4, 15	1
PCard Training	Administrative	4/17/2017	6/30/2017	73	4, 15	1
USF Office of Supplier Diversity Strategic Plan Development	Administrative	4/17/2017	6/30/2017	73	9, 10, 13, 14	
USF Office of Supplier Diversity General Budget Development	Administrative	4/17/2017	6/30/2017	73	2, 9	
Identification of Staffing Needs (USF System) Budget Development	Administrative	4/17/2017	6/30/2017	73	Item #2	
Begin Hiring USFOSD Dedicated FTEs based on Identified Staffing Needs (Organizational De	Administrative	7/1/2017	12/31/2017	180	Item #2	
Launch PCard Training to Build Program Awareness	Administrative	4/17/2017	9/1/2017	134	1	1, 2
Development of OSD Office Presentations for Community Outreach	Administrative	4/17/2017	9/1/2017	134	5	
Agency Rebrand:	MKT & COMM	4/17/2017	12/31/2017	254	18	5
Website (Design and Content Development)	MKT & COMM	4/17/2017	12/31/2017	254		
All Marketing and Collateral Material	MKT & COMM	4/17/2017	12/31/2017	254		
Social Media Campaign Development	MKT & COMM	4/17/2017	12/31/2017	254		
Design and Brand Tradeshow Exhibit Display	MKT & COMM	4/17/2017	12/31/2017	254		
Design and Brand OSD Long in conjunction with USF Mkt. & Comm.	MKT & COMM	4/17/2017	12/31/2017	254		
Design OSD Apparel and Promotional Items for Internal & External	MKT & COMM	4/17/2017	12/31/2017	254		
Identify & Meet with USF Stakeholder in Areas of Opportunity for XBE Utilization	Administrative	4/17/2017	12/31/2017	254	1,	
Develop Spend Data Collection and Analytic Procedure in conjunction with Purchasing	Purchasing Services	4/17/2017	12/31/2017	254	10, 13	
Development of a Diverse Supplier Portal (Certified XBEs Only)	Administrative	4/17/2017	10/1/2017	164	Item #3, 5,6,7	
Development and Launch of Lunch & Learn Supplier Diversity Series	Administrative	4/17/2017	10/1/2017	164	Item #1, 5,6,7, 15	
Development and Launch of a "How to do Business with USF Series"	Administrative	4/17/2017	10/1/2017	164	18	
Establish Partnerships USF System Wide for Proper Project Management in all Categories	Administrative	4/17/2017	12/31/2017	254	1,2	
Establish SD Project Management Guidelines for Major USF Projects	Administrative	4/17/2017	12/31/2017	254	3?, 17	
Total Estimated Project Hours				39472		

*Areas identified in the SWOT Analysis by number and area (Weaknesses & Threats) are being addressed by each project goal represented within the short, medium and long term goals.

APPENDIX D – MID TERM GOALS

UNIVERSITY OF SOUTH FLORIDA OFFICE OF SUPPLIER DIVERSITY					
MID-TERM PROGRAM GOALS (1-3 YEARS)					
PROJECT NAME	PROJECT TYPE	ESTIMATED START	ESTIMATED FINISH	ESTIMATED DURATION (DAYS)	SWOT - Weaknesses
Establish USF Employee Award & Recognition Program	Business Processes	1/1/2018	10/1/2018	270	15
Complete Hiring USFOSD Dedicated FTEs based on Identified Staffing Needs	Administrative	1/1/2018	1/31/2018	30	2
Train and Develop USFOSD Staff	Staff Development	1/1/2018	12/31/2020	1080	2, 9, 10, 11, 12, 13, 14
Begin Procurement/Development of Data Analytics Tool to Track XBE Spend (Tier 1 & Tier 2)	Business Processes	1/1/2018	12/31/2020	1080	10, 14
USF Office of Supplier Diversity Strategic Plan Review & Update (Current Year)	Administrative	1/1/2018	12/31/2020	1080	9, 10, 13, 14
USF Office of Supplier Diversity General Budget Review & Update (Current Year)	Product Liability Defense	1/1/2018	12/31/2020	1080	2, 9
Implementation of Educational Series for Emerging Businesses (Possibly Kauffman Series)	Outreach & Education	1/1/2018	12/31/2020	1080	17, 18
Grow Available USF Diverse Suppliers	Outreach & Education	1/1/2018	12/31/2020	1080	17, 18
Identify & Meet with USF Stakeholder in Areas of Opportunity for XBE Utilization	Outreach & Education	1/1/2018	12/31/2020	1080	Item #1, 5,6,7, 15
General Program Management and Community Relations	Outreach & Education	1/1/2018	12/31/2020	1080	1, 4,5,6,7, 17, 18
Agency Brand Maintenance:	MKT & COMM	1/1/2018	12/31/2020	1080	18
Website (Design and Content Development)	MKT & COMM	1/1/2018	12/31/2020	1080	
All Marketing and Collateral Material	MKT & COMM	1/1/2018	12/31/2020	1080	
Social Media Campaign Development	MKT & COMM	1/1/2018	12/31/2020	1080	
Design and Brand Tradeshow Exhibit Display	MKT & COMM	1/1/2018	12/31/2020	1080	
Design and Brand OSD Long in conjunction with USF Mkt. & Comm.	MKT & COMM	1/1/2018	12/31/2020	1080	
Design OSD Apparel and Promotional Items for Internal & External	MKT & COMM	1/1/2018	12/31/2020	1080	
Total Estimated Project Hours				16500	

*Areas identified in the SWOT Analysis by number and area (Weaknesses & Threats) are being addressed by each project goal represented within the short, medium and long term goals.

APPENDIX E – LONG TERM GOALS

UNIVERSITY OF SOUTH FLORIDA OFFICE OF SUPPLIER DIVERSITY						
LONG-TERM PROGRAM GOALS (3-5 YEARS)						
PROJECT NAME	PROJECT TYPE	ESTIMATED START	ESTIMATED FINISH	ESTIMATED DURATION (DAYS)	SWOT - Weaknesses	SWOT - Threats
Fully Operational SD Program, Fully Staffed Across USF System	Administrative	1/1/2021	12/31/2022	720	2	
Formal USF System Disparity Study (In Conjunction w/State of FL)	Business Process	1/1/2021	12/31/2022	720	13, 14	
Facilities, Planning & Construction Mentor Protégé Program	Outreach & Education	1/1/2021	12/31/2022	720	2, 4	
Maintenance of Diverse Supplier Portal (Certified XBEs Only)	Administrative	1/1/2021	12/31/2022	720	17, 18	5
Continued Implementation of Lunch & Learn Supplier Diversity Series	Outreach & Education	1/1/2021	12/31/2022	720	Item #1, 5,6,7, 15	5
Implementation of Data Analytics Tool to Track XBE Spend (Tier 1 & Tier 2)	Business Process	1/1/2021	12/31/2022	720	10, 14	
USF Office of Supplier Diversity Strategic Plan Review & Update (Current Year)	Administrative	1/1/2021	12/31/2022	720	9, 10, 13, 14	
USF Office of Supplier Diversity General Budget Review & Update (Current Year)	Administrative	1/1/2021	12/31/2022	720	2,9	
Continuation of Full Educational Series for Emerging Businesses	Outreach & Education	1/1/2021	12/31/2022	720	17, 18	5
Grow Available USF Diverse Suppliers	Outreach & Education	1/1/2021	12/31/2022	720	17, 18, 5,6,7	5
General Program Management and Community Relations	Outreach & Education	1/1/2021	12/31/2022	720	1, 4,5,6,7, 17, 18	
Identify & Meet with USF Stakeholder in Areas of Opportunity for XBE Utilization	Outreach & Education	1/1/2021	12/31/2022	720	1,4,5,6,7	
Total Estimated Project Hours				8640		

*Areas identified in the SWOT Analysis by number and area (Weaknesses & Threats) are being addressed by each project goal represented within the short, medium and long term goals.

APPENDIX F – BUDGET

Budget Request - Office of Supplier Diversity 17-18				
PERSONNEL				
	Salary	Fringe		
Assistant Vice President	\$140,000.00	\$ 56,000.00	\$	196,000.00
Business Analyst	\$ 60,000.00	\$ 24,000.00	\$	84,000.00
Subtotal	\$200,000.00	\$ 80,000.00	\$	280,000.00
OPERATIONS				
Outreach/In-reach			\$	1,500.00
General Department Marketing & Collateral Materials			\$	29,355.00 *
Awards			\$	3,500.00
Supplier Diversity Day			\$	10,876.00 Partial*
Community Engagement (4 Events):			\$	-
2 - Amalie Arena			\$	5,000.00 **
2 - Raymond James			\$	5,000.00 **
Lunch & Learn			\$	3,500.00 *
Educational/Program Development			\$	- ***
Corporate Sponsorships			\$	7,000.00
Memberships			\$	13,000.00
AVP Training (2 Conferences - \$3K each)			\$	6,000.00
Staff Training			\$	3,000.00
Staff Support (\$1500 per person)			\$	4,500.00
Subtotal			\$	92,231.00
TOTAL BUDGET REQUEST			\$	372,231.00
* In Kind				
** Limited sources of university funding				
*** Cost to be determined at a later date				
ADDITIONAL PERSONNEL - See ongoing tab				
	Salary	Fringe	Training & Support	
Administrative Specialist	\$ 38,080.00	\$ 15,232.00	\$ 1,500.00	\$ 54,812.00
Project Manager - St. Pete	\$ 40,000.00	\$ 16,000.00	\$ 4,500.00	\$ 60,500.00
Project Manager - Sarasota	\$ 40,000.00	\$ 16,000.00	\$ 4,500.00	\$ 60,500.00
				\$ 175,812.00

APPENDIX G- SAMPLE CONTRACT BOILERPLATE DIVERSE BUSINESS UTILIZATION LANGUAGE

PROPOSED CONTRACT BOILERPLATE LANGUAGE FOR DIVERSE BUSINESS UTILIZATION (TO BE REVIEWED AND APPROVED BY USF GENERAL COUNSEL)

The University of South Florida actively encourages the continued development and economic growth of diverse businesses and it is vital that minority-, women- and veteran-owned business enterprises participate in the University of South Florida System procurement processes as both prime contractors and subcontractors.

To this end, a Respondent is expected to submit in each response a Diverse Business Sub-Contractor Utilization Plan in conjunction with USF Purchasing and the USF Office of Supplier Diversity.

The Plan must show that there are, participating in the proposed contract, Minority-, Women-, Veteran-Owned Business Enterprises certified with one of the approved certifying entities by the USF Office of Supplier Diversity or that appear on the USF Office of Supplier Diversity listing of approved firms. Approved certifying entities can be found on the USF Office of Supplier Diversity website at www.usf.edu/osd.

Respondents must indicate on the provided Sub-Contractor Utilization Form, the name of the diverse firms with which it will work, the contact name and phone number of the firm(s), the service supplied by the firm(s), the specific dollar amount from this contract that will be directed toward each firm, and the approximate date these products and/or services will be utilized.

If participation is met through use of vendors who supply products and/or services, the Respondent must also indicate the vendor's tax ID number as well as provide a description of products and/or services provided to the Respondent that are directly related to this proposal and the cost of direct supplies for this proposal.

All prime contractors, including diverse prime contractors, must meet the contract goals (established as project specific goals) through use of subcontractors. Diverse prime contractors will get no credit toward the contract goal for the use of its own workforce.

If established participation levels are not met, the USF Office of Supplier Diversity will make the final determination as to whether the bidder made sufficient good faith efforts to achieve the established goals and what action if any will be taken. Potential actions that could be taken could include but are not limited to contract termination or suspension from bidding on any USF System opportunity for up to 3 years.

USF Purchasing in conjunction with the USF Office of Supplier Diversity reserves the right to verify all information included in the Plan. Respondents are encouraged to contact and work with the USF Office of Supplier Diversity for recommendations only for the design of the Respondents plan to meet the established goals. The USF Office of Supplier Diversity website address is www.usf.edu/osd and contains a listing of approved certification entities for firms being considered by the Respondent.

This USF System Policy applies to any construction or development project or part thereof, in excess of one hundred fifty thousand dollars (\$150,000), and any contract for the provision of goods and services in excess of twenty-five thousand dollars (\$25,000).

APPENDIX H- SAMPLE SUB-CONTRACTOR AGREEMENT FORM

SAMPLE – SUBCONTRACTOR AGREEMENT REPORTING FORM

USF System Department	USF System Contact Person and Phone	Contract Number	Award Date	Contract Amendment Number	Original Contract Value	Updated Contract Value	Notice to Proceed Issue Date

Award of this Contract is based, in part, on the Diverse-Owned Business Utilization Plan. The following certified diverse-owned subcontractors will be participating on this contract (*if more space is needed, please attach an additional sheet*):

Diverse-Owned Company Name	Diverse-Owned Business Phone & Contact Person	Diverse-Owned Business Tax ID# (If Supplying Products or Services)	Detailed Scope of Product or Services	Anticipated Utilization Date	Percentage of Utilization	Dollar Value of Utilization

A copy of each subcontractor agreement must be submitted to the University of South Florida Office Supplier Diversity within thirty (30) days of the effective date of the Contract. Failure to provide any subcontractor agreement may be considered a material breach of the awarded Contract and may result in contract termination. **The selected Prime Contractor must obtain approval from the USFOSD before changing the participation plan submitted in connection with this Contract.**

The Contractor shall report payments made to the USFOSD at osd@usf.edu for all subcontractors under this Contract on a monthly basis. In the subject line include the following, **“DIVERSE BUSINESS REPORT MM/DD/YEAR – CONTRACT #, COMPANY NAME”**. All monthly reports shall be made using the forms and methodology provided, which has been determined by the USFOSD.

Submitted by: _____ Date: _____

For USFOSD Use Only

Date Received: _____ USF Agent: _____