

USF System Strategic Plan & Supporting Information



Table of Contents

STRATEGIC PLAN	3
I. Executive Summary	4
II. Introduction	6
III. The USF System Strategic Plan	10
A. Mission	10
B. Vision.....	10
C. Values.....	10
D. Stakeholders	11
E. Strategic Goals	12
F. Strategic Goal Strategies.....	13
G. Adaptive Strategic Planning.....	15
H. Measuring Success.....	16
SUPPORTING INFORMATION	20
IV. Key USF System Existing Shared Services/Resources	20
A. USF Health.....	20
B. Community Engagement and Role of Alumni.....	21
C. Corporate Partnerships.....	22
D. Research & Innovation.....	23
E. Diversity, Inclusion & Equal Opportunity.....	23
F. Brand Recognition.....	24
G. Information Technology.....	25
H. Finance and Administration	26
I. Risk Management	27
J. Athletics	29
K. Government Affairs.....	31
V. Key Considerations for the Future of the USF System.....	34
A. Reputation and Brand.....	34
B. Criteria for New Degree Programs.....	34
C. Synergies and Economies of Scale	35
D. Accreditation, Legislative Funding and Governance.....	35
E. Collaboration.....	36



VI. The System Institutions	38
A. Descriptions of the Institutions.....	38
B. Strategies of the Institutions.....	40
1. USF Tampa	40
2. USF St. Petersburg.....	41
3. USF Sarasota-Manatee.....	42
VII. Conclusion.....	45
VIII. Appendix.....	47
A. Links to Cited Materials.....	47
B. Strategic Plan Development Process and Timeline Materials	47



I. Executive Summary



I. Executive Summary

In July 2016, the University of South Florida Board of Trustees requested University of South Florida System President Judy Genshaft and her team to update the 2010 USF System Strategic Plan. As such, she assembled a planning committee composed of leaders from throughout the USF System to guide the plan's development, and a writing subcommittee to compile and prepare the updated plan.

The plan update was based, in part, on a synthesis of the extensive community involvement and planning processes previously undertaken by the three institutions comprising the USF System - Tampa, St. Petersburg, and Sarasota-Manatee - during the development of their respective strategic plans¹. Each institution's plan was the product of a robust, collegial, transparent, and accountable process involving multiple key stakeholders, deliberate community engagement, and numerous meetings and communication sessions.

In building upon that framework, the USF System Strategic Plan is also based on stakeholder interviews, a review of best practices, feedback from academic and corporate planners, and the individual strategic plans of many of the existing USF System's shared resource units. The resulting approach provides a framework within which each individual institution can pursue its specific goals while simultaneously advancing the broader goals of the USF System.

These broader goals include leveraging System capabilities to allow member institutions to set more ambitious goals and achieve greater success than they would otherwise, activating key constituencies, and broadening the recognition of the USF System's reputation for excellence.

The 2017 Plan recognizes how the USF System has progressed over the past seven years, at the same time that it anticipates coming changes in higher education. It also recognizes there may be changes coming which cannot be anticipated, therefore the plan is meant to be a living document that will regularly be modified based on the evolving education landscape. Embedded in the plan is a process for ongoing reflection and amendment to keep the USF System improving for the benefit of its students and the community.



¹ The strategic plans for each institution are implemented by their respective leadership. The plans are summarized in Section VI of this document and a link to each full plan is available in the appendix.

II. Introduction



II. Introduction

The USF System is comprised of three separately accredited institutions - USF (where appropriate in this plan, for ease of reference, also called USF-Tampa), USF St. Petersburg, and USF Sarasota-Manatee. USF Tampa encompasses the main research campus, the College of Marine Sciences, and USF Health.

The USF System is defined in *USF Governance Policy 07-001* and is led by a single Board of Trustees and President which provide guidance, oversight, and synergistic shared services to each of the institutions to enable them to better meet and exceed goals. The *USF System Governance Policy* also outlines shared services and resources to be provided to System member institutions.² The USF System's purpose is to add value to each of the member institutions, enabling greater student success and community enrichment than each institution could achieve singularly.

The Florida Board of Governors (the overarching university governance body for the state of Florida) was created simultaneously with the University of South Florida Board of Trustees (which governs the USF System) in 2003.³

The University of South Florida was legislatively established as early as 1956⁴, subsequently, the regional institutions – the University of South Florida St. Petersburg and the University of South Florida Sarasota-Manatee – were legislatively recognized⁵. In 2005, legislation was adopted that required each institution to be separately accredited. Important to this plan, it should be noted that currently, each regional institution:

- a. Is operated and maintained as a separate organizational and budget entity of the University of South Florida;
- b. Seeks and achieves separate accreditation from the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC);
- c. Has its own campus board appointed by the USF Board of Trustees;
- d. Reviews/approves annual legislative budget requests and operating plans/budgets; and subsequently submits these operating plans and budgets for review and approval by the USF System President and Board of Trustees, and
- e. Is administered by a Regional Chancellor, who is appointed by, reports to, and may receive assignments from the President of the USF System; administers institutional operations; and recommends annual legislative budget requests and an annual operating budget to the campus Board.

² A non-exhaustive summary of USF System Shared Services is provided in Section IV.

³ Florida Constitution; Art. IX, Sec. 7.

⁴ Florida Statute §1000.21

⁵ Pursuant to F.S. 1004.33 and 1004.34, respectively.

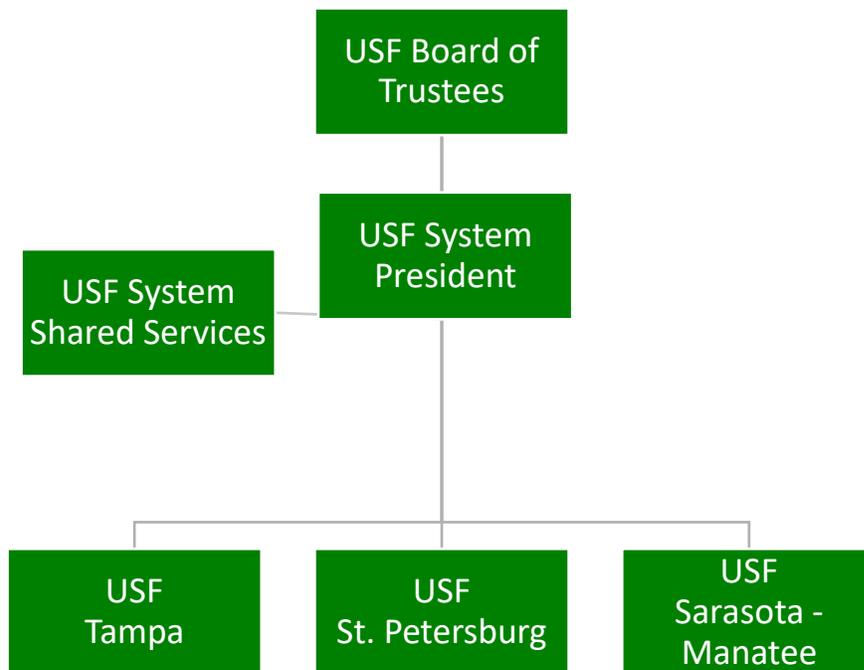


While each separately accredited institution conducts its admissions decisions locally, students enrolled at each institution are registered in a comprehensive and coordinated student information system.

Typical of most systems nationwide, the USF System is not accredited itself, does not report collectively to the Integrated Postsecondary Education Data System (IPEDS), does not grant degrees, is not eligible for membership in the Association of American Universities (AAU), and is not able to participate in rankings such as published by *U.S. News & World Report*. However, these attributes are largely available to each member of the USF System, especially those entities accredited by the SACSCOC.

The USF System is complemented by eight direct support organizations (DSO's) which, by law⁶, are separate non-profit corporations. The mission of each is to support various University activities. Neither the role nor supportive function of each DSO is addressed in this plan; however, may be included in subsequent plan updates.

USF System governance is further illustrated in the chart below which reflects that all members and entities of the USF System report to one President and one Board.



What Makes the USF System Unique?



⁶ Florida Statute §1004.28

Utilizing its outstanding component parts, the resulting USF System is youthful, energetic, entrepreneurial, nimble, and collaborative. Its age gives it a competitive advantage in that it is unconstrained by long-held traditions; instead, it embraces the rapid change occurring around it to better serve its students and the community. The USF System is the only federation of multiple, separately accredited institutions in the State University System of Florida.

This USF System Strategic Plan contemplates, analyzes and leverages each institution's individual strategic plan, with an eye toward the USF System contributing to greater and speedier achievement of each institution's goals.



III. The USF System Strategic Plan



III. The USF System Strategic Plan

Following are the essential elements of the USF System Strategic Plan. As noted in the introduction, this plan is built upon the foundation established by the individual institution strategic plans, including the engagement process undertaken by each. It is intended to align with the *USF Governance Policy* and reflect the guidance provided by the members of the USF Board of Trustees.

A. Mission

The University of South Florida System, which includes USF Tampa, USF St. Petersburg, and USF Sarasota-Manatee, catalyzes and coordinates initiatives at and among its interdependent institutions to prepare students for successful 21st century careers; advances research, scholarship, and creative endeavors to improve the quality of life; and engages its communities for mutual benefit.

B. Vision

The University of South Florida System will empower and connect its institutions into a distinctive system that is nationally and globally recognized for innovation in teaching and research, for attracting outstanding and diverse scholars, staff and students and for transforming the communities in which we operate as well as those where our graduates apply their skills.

C. Values

From January through April 2015, a work group on system-guiding principles was empaneled by then Academic and Campus Environment Chair Brian Lamb. The work group was chaired by Trustee Stan Levy. They were joined at each meeting by guests from each institution's administration, faculty, student leadership, staff, the USF System President, and the Regional Chancellors. There was unanimity of sentiment over the course of the meetings. To easily communicate the shared sentiment and vision, USF System-wide values are represented by the acronym "BULLISH" and are described below:

Bold: We think quickly on our feet, adapt readily to obstacles, and look for innovative solutions to the world's most challenging problems.

United: We are stronger together. We value unity. The whole is greater than the sum of its parts. Seeking new ways to work together and maximize efficiencies is part of our DNA.



Leaders: We are committed to the success of our people. We nurture talent and value opportunities to grow and develop professionally. We hold our people accountable.

Loyal: We treat each other with respect, trust and integrity. We do what we say we are going to do. We are loyal to each other and for the good of the USF System. We act in the spirit of academic and professional collegiality. We must celebrate each other's successes and advocate for each other's priorities.

Impactful: We make a difference. We are civically and economically tied to our communities. We are global citizens. We are engaged with each other, as well, and our work unites the Tampa Bay region. The USF System is a catalyst to regional economic development and success.

Student-centric: Students must be at the center of every decision we make that impacts students. We must work together with students to ensure that we maximize opportunities for their success and their ability to move across USF System in ways that align with separately accredited institutions and/or programs.

High-quality: This articulates USF System's passion for delivering quality service to students, faculty, staff, employers, community and other member institutions.

These values will serve to facilitate the execution of the current and future strategic plans as well as improve system-wide unity and collaboration. These values were embraced by the Board of Trustees ACE workgroup in May of 2015.

D. Stakeholders

The USF System has a large and diverse group of stakeholders. It is important to understand how all stakeholders interact with the USF System and how the USF System can best address their interests and needs. A non-exhaustive list of key stakeholder categories is noted below.

Students

- Current
- Prospective
- Alumni
- Parents and families
- Source institutions
(K-12, colleges, others)

Faculty & Staff

- Faculty
- Shared services support
- Direct Support Organization
(DSO) staff
- Other staff



Suppliers

- Value-added partners
- Mission critical resource partners

Community

- Peer institutions
- Economic development organizations
- Employers and Businesses – small, medium and large
- Diversity groups
- Social advocacy groups
- Community enhancing services
- Media
- Research organizations, industry standards bodies (public and private)
- Skilled, qualified, informed and engaged citizens

Government

- Local
 - Elected officials
 - Regulating bodies
 - Qualified and informed voters
- State
 - Elected official
 - Board of Governors of the State University System
 - Qualified and informed voters
- Federal
 - Elected officials
 - Department of Education
 - Qualified and informed voters
- International
 - Peer institutions, faculty and students

E. Strategic Goals

As the umbrella organization of this highly complex organization, the USF System has both the responsibility and the opportunity to bring to bear the unique strengths of its component institutions and entities. United by common purposes, the USF System has three overarching goals. These have been developed through consultation with leaders and constituents from throughout the USF System and reflect the aspiration of the USF System to be of maximal service to its institutions and entities:

Goal 1: Leverage the USF System and its capabilities to enable each member institution to set more ambitious goals and achieve greater success than they would otherwise.

The USF System strives to become an internationally prominent and highly-collaborative system that propels its separately accredited member institutions and students to a higher level of achievement. Each element of the USF System will be recognized for being a leader in its respective class.



Goal 2: Activate key constituencies to provide value to our institutions, region and the State of Florida.

Strengthen community engagement, cultivate alumni involvement and promote economic leadership.

Goal 3: Be widely known for excellence.

Create a nationally and globally established brand that provides a competitive advantage for its students, faculty and staff.

F. Strategic Goal Strategies

Key strategies have been developed in conjunction with each goal to guide the USF System and focus our strategic efforts. These strategies are the culmination of a deeply deliberative and self-reflective process. They incorporate what has been achieved thus far, what is currently functioning well and what needs to be improved to rise to the challenges of higher education in the future. Some anticipated trends include: the continuing growth of online education; increased tuition costs; increasingly constrained resources; the need for public universities to better match their offerings with community needs and employment opportunities; and the growing acceptance of the European model of focus on job-oriented skills and subsequent certificates, instead of just the traditional baccalaureate degree.

The strategies are outlined below along with their respective goals:

Goal 1: Leverage the USF System and its capabilities to enable each member institution to set more ambitious goals and achieve greater success than they would otherwise

1. Maintain an intense focus on student achievement by all, in order to assist students in fulfilling their dreams.
2. Continuously organize and adapt the shared service organizations to provide the best possible cost-effective solutions for the institutions.
3. Establish an ongoing partnership with each institution's leadership team to understand the unique market dynamics and audiences of each and to assist in propelling them to reach their goals.
4. Utilize technology and face-to-face meetings across departments, colleges and geography to accelerate innovation and collaboration throughout USF System.



5. Ensure that the technology and processes enable students to have seamless access to educational opportunities across the USF System wherever possible.
6. Connect with and build global relationships to offer value-added services and relationships to the institutions and their students.

Goal 2: Activate key constituencies to provide value to our institutions, region and the State of Florida

1. Engage key stakeholders, such as alumni who often serve as USF System ambassadors and advocates both in the Tampa Bay region and nationally and internationally, to provide zealous advocacy for the USF System in all applicable domains (community, business, legislative, media, etc.).
2. Support the Office of Corporate Partnerships in developing its plan, track its progress, and find new ways to build value for students and the community.
3. Utilize technology and face-to-face connectivity to engage alumni in meaningful ways so they see increased return for their educational investment and the results of their advocacy and philanthropy.
4. Engage government agencies and elected officials in each institution's service area to build trust and a collaborative framework from which to achieve success.
5. Expand the leadership role the USF System plays in the community by placing USF System personnel, students, and alumni in community leadership positions that enhance student experiences and promote economic development such as chambers of commerce and other economic development organizations.
6. Maintain and grow diversity across the institutions to cultivate the richness of offerings while building a competitive advantage.

Goal 3: Be widely known for excellence

1. Promote the USF System as the best education destination in Florida and as a magnetic place that will attract students to actualize their goals.
2. Collaborate across the three institutions in communications and marketing for purposes of strengthening the USF System brand.
3. Expand the communications capability for targeted outreach, inclusive of funders, value added partners, the media, and key communities.
4. Establish and promote an updated visual identity and brand for the USF System that will represent the diversity and aspirations of the



organization in accordance with the *USF System Governance Policy #007-001*.

5. Establish and manage guidelines for separately branding and promoting each institution's unique capabilities and personalities in key markets.

G. Adaptive Strategic Planning

The USF Board of Trustees has requested that the USF System Strategic Plan be continuously updated through an adaptive process. The process will include the following functions and processes:

1. A USF System Strategic Planning Committee, consisting of leaders and faculty representatives of the institutions and major entities, as well as a member of the USF Board of Trustees, will monitor and collect information relevant to the USF System Strategic Plan.
2. The Strategic Planning Committee will meet at least once every six months to review the measures of the plan's success, the current state of changes in higher education and the relative position of the USF System and its institutions compared to current and aspirational peers.
3. If more research or introspection is required, the Strategic Planning Committee may request system resources to conduct further study. The USF System Strategic Plan will be critically reviewed on a no-less-than semi-annual basis.

It is anticipated that the following areas (at a minimum) will be addressed in future updates:

1. **Role of the USF System**
The role of the USF System is to serve as a resource that assists each institution in meeting and exceeding its respective goals. The USF System will need to collaborate with the three institutions and other entities to seek ways to continuously improve without adding an excessive burden of cost to its members.
2. **Value Distribution & System Structure**
Rather than create an expensive central office, the USF System tends to depend on leaders with shared roles and responsibilities. Value creation often occurs by collaboration and shared expertise. By way of example, the new residence halls at USFSP were funded with bonds collateralized by USF Tampa.



The organizational structure of the USF system, and the resources it employs, will need to be examined regularly to ensure that adequate capabilities are maintained, that representation is equitable, and that stakeholder needs are well-served.

3. Defining Stakeholders

System stakeholders have been roughly outlined in this plan. During the monitoring process the committee may want to add or further refine the list.

4. USF System Measures of Success

Unlike separately accredited institutions, systems do not have widely-accepted metrics, lack rankings by sources such as *U.S. News & World Report*, and tend to be far too heterogeneous to have adequate benchmarking data available. One clear measure of success will be improvements in rankings of members and entities, satisfaction of member leadership and the performance of the institutions against the goals they have set for themselves.

5. Future of Higher Education

Higher education is in a period of tumult not seen since the 1960s. Resources are increasingly constrained while expectations to improve affordability and accountability have never been greater. Universities are increasingly seen as economic engines that not only drive the local economy with their own spending, but also who partner with industry to create joint ventures in the region, provide a pipeline of future employees to businesses and generate intellectual property that advances the public good. These demands come at a time when there is increasing political polarization in our country and protests from both the right and the left are commonplace on American campuses. The USF System Strategic Planning Committee, with System leadership and the Board of Trustees, must be ever vigilant to steer the USF System on the ideal course in such turbulent waters, being mindful to find the most effective path to providing a quality educational experience, while managing the rising cost of tuition.

H. Measuring Success

At its most basic level, the success of this System Strategic Plan will be tracked on a continuous basis through the State University System (SUS) Work Plan process, with each institution submitting its own goals and objectives that roll-up to one System-wide plan. The metrics are evaluated annually by the Board of Governors as part of Annual Accountability Reports and the SUS Performance Based Funding model. The USF System's goals, at both System and local levels, will serve to maintain the USF System's leadership position among the SUS in terms of Performance-based funding.

Additional qualitative and quantitative metrics that will assist in evaluating the



progress of this plan include:

- Careful monitoring of the “reputation” component of national and international rankings, with the expectation of an upward trend and the eventual creation of a system halo-effect.
- Internal stakeholder survey results that assess member satisfaction, cost, and quality of key system capabilities, as well as explore the need for development of additional capabilities.
- Metrics to be developed by the Office of Corporate Partnerships, such as number of patents awarded, industry supported grants, and USF System start-up companies.

The USF System, its institutions and component parts continue to evolve. Working together, the USF System seeks to enhance the success of its members, engage, energize and provide ease of access to its community and key stakeholders in a unified manner, and better establish its reputation in the region, state, nation, and world.



Supporting Information



IV. Key USF System Existing Shared Services/Resources



SUPPORTING INFORMATION

IV. Key USF System Existing Shared Services/Resources

The USF System currently provides support to the three institutions and other System entities in the form of shared services or resources. Following is an outline of illustrative examples of several key services or resources to which all member institutions have access. Due to the length of this plan, many other key shared services, such as those of the USF Executive Vice President and Provost, Office of Decision Support, Financial Aid, General Counsel, the Library, Registrar, and USF World will be included in subsequent supportive resource plan documents.

For each of the areas below, their leadership summarized their respective services in the context of the USF System Goals. The descriptions that follow were submitted by the leadership of each area and are recounted, in their own words.

Goal 1: Leverage the USF System and its capabilities to enable each member institution to set more ambitious goals and achieve greater success than they would otherwise

Goal 2: Activate key constituencies to provide value to our institutions, region and the State of Florida

Goal 3: Be widely known for excellence

A. USF Health⁷

USF Health spans many disciplines that range from laboratory investigation to direct patient care at the bedside. Unifying such academic diversity is one overall mission: “Making Life Better.” To that end, USF Health has identified four strategic goals which will help guide management and operational decisions in the coming years and will make USF Health widely known for excellence.

First, produce global citizens of the highest caliber through its continuing commitment to student success at the professional, doctoral, masters and undergraduate level by:

- Increasing admission scores
- Increasing national exam test scores
- Recruiting residents with higher test scores
- Increasing international learning experiences
- Creating new degrees/programs tailored to meet future workforce needs



⁷ While USF Health is a shared resource to each of the USF Institutions, it is not one of the shared services as described in the USF System Governance Policy.

Second, expand high-impact and quality research to change lives, improve health and foster sustainable development and positive societal change, while obtaining enhanced research resources and hiring world class faculty/research staff by:

- Increasing NIH RO1 funded investigators
- Increasing national research rankings
- Increasing National Academy faculty members
- Increasing post doctorate fellow presence
- Increasing research endowments

Third, elevate the standards of clinical care by providing innovative, top quality, compassionate, culturally competent, and accessible health care by:

- Expanding primary care offerings and physician providers.
- Empowering non-physician healthcare providers to be integral members of a cost-effective team
- Improving clinical operation and efficiency
- Enhancing excellent specialty care
- Creating and maintaining strategic partnerships

Fourth, achieve sound financial management and fiscal self-sufficiency by identifying appropriate resources to support USF Health, including:

- Emphasizing philanthropy via increased donors and donations
- Optimizing clinical operations to enhance physician group financial performance
- Aligning regional providers into a centrally integrated network (CIN)
- Retaining MCOM medical school and residency graduates in Florida

B. Community Engagement and Role of Alumni

USF Advancement, comprised of the USF Foundation and the USF Alumni Association, strengthens community engagement through cultivation of the key constituencies of alumni and friends of the USF System. Through our outreach efforts and development programs we engage individuals and businesses with the university, resulting in increased financial support and advocacy for the USF System.

The USF Foundation is poised to complete the “USF: Unstoppable” campaign, which will cross the \$1B threshold in 2017. Upon completion of the campaign efforts will continue with focus on:

- Matching USF System-identified strategic priorities with donor interests to achieve yearly fundraising commitments of \$70-\$100M or more
- Increasing the number of alumni donors



- Growing the base of support from the business community
- Continuing annual increases in the percentage participation of faculty and staff giving
- Growing the endowment to more than \$500M

The USF Alumni Association will continue to employ strategies for engaging alumni, students, and the broader community with programs and activities, communications, and opportunities designed to build loyalty to the university by:

- Hosting major annual events that appeal to general-interest audiences (e.g. Homecoming), and targeted audiences, (e.g. Fast 56 business awards).
- Increasing relationships with the business community through initiatives like “In the Bull’s Eye,” which offers major employers programming for their alumni employees to help them reconnect with USF.
- Providing leadership and support to 50-plus alumni based chapters and societies around the country which give alumni a “USF-home” wherever they reside.
- Utilizing print and digital communications tools to share news of interest and USF pride with alumni.
- Offering numerous service opportunities at USF for alumni and friends such as: serving as volunteers; raising money for student scholarships; and mentoring students in one-on-one relationships.

C. Corporate Partnerships

In 2017, the USF Office of Research & Innovation launched the new Office of Corporate Partnerships, creating a single point of entry for private industry to forge mutually-beneficial alliances that advance the academic, research and innovation goals of the USF System. Working through these enhanced partnerships, the goal of the office is to generate more research funding and greater access to highly specialized facilities; create jobs and internships for students; and make it easier for corporate entities to contribute new fellowships, in-kind gifts, foundation funding, event sponsorships and more.

The USF Office of Corporate Partnerships allows companies and the USF System institutions to connect in dynamic and highly productive new ways. It resolves what can be a confusing process for industry in reaching the appropriate contact within our large university system. A successful corporate relations program acts as an ultra-concierge service – pairing businesses seeking a relationship with the university with the right program for them. The Office of Corporate Partnerships will attract more companies to USF’s Research Park to build offices and labs where USF faculty, students, and industry can collaborate on leading-edge projects and products. It ensures consistency, clarity and a seamless experience when a



company wants to become involved with other parts of the university, from individual colleges to specific programs. Ultimately, the Office seeks to proactively identify potential industry partners in the community to partner with the institutions of the USF System.

D. Research & Innovation

The mission of the USF Office of Research and Innovation is to create new knowledge and solutions for global problems, while preparing students to serve the future needs of society. At USF, special emphasis is placed on six focus areas of research: brain and spinal cord; data science; heart research; research translation and commercialization; human security; and water.

The following goals have been created by the USF Office of Research and Innovation to align with the USF System's strategic goals: increase USF rankings among public research universities; raise the visibility of research to increase national and international reputation; promote collaboration to foster a transdisciplinary research culture; and maximize the economic and social impact of research activities. The USF System Research Strategic Plan has devised the following strategies:

- To increase research rankings: Develop research infrastructure, seed funds and increase research capacity.
- To meet the goal of visibility: Increase visibility by defining the research brand and deploying greater communications efforts; increase opportunities for connection with external peers, and help faculty gain internal and external honors and recognition.
- To meet the goal of collaboration: Increase incentives and decrease barriers for collaborations and build and scale-up research support at USFSP and USFSM.
- To meet the goal of creating impact: Cultivate a start-up culture; foster university-industry collaborations, build strategic research partnerships among local organizations and enhance community-engaged research and economic development.

E. Diversity, Inclusion & Equal Opportunity

The USF System Office of Diversity, Inclusion, and Equal Opportunity (DIEO) is responsible for navigating the institutional efforts for diversity and equity for the USF System. Diversity work is both centralized in DIEO and decentralized throughout the USF System. DIEO partners with colleges, divisions, and units to enhance and develop their specific diversity goals and efforts. Diversity and



inclusion are core institutional values and directly contribute to the success of the USF System mission and goals.

The current strategic diversity system plan builds on the CLEAR diversity framework which is based on best diversity practices. Each area identifies specific goals, strategies and measures detailed in the full plan.

CLEAR encompasses six areas of emphasis for all three institutions:

- Climate (welcoming, supportive and safe environment)
- Leadership (building capacity to sustain diversity work and supplier diversity efforts)
- Excellence (preparing students for success in the global environment)
- Attainment (access, retention and success for underrepresented and diverse students)
- Representation (growing and retaining the diversity of the faculty and managerial staff)

DIEO also monitors compliance with the USF System policies and procedures to maintain a respectful learning and work environment. DIEO has jurisdiction to engage in conflict resolution and/or investigate complaints that can prove disruptive to the diversity and inclusion values of the USF System. Through a successful and diverse cadre of students, faculty, and staff, the DIEO helps the USF System to exceed its goals, activate key constituencies and be widely known for excellence.

F. Brand Recognition

As Trustee Zimmerman has pointed out, in the same manner that Buick, Chevrolet, GMC, and Cadillac all fall under the overarching General Motors brand, the University of South Florida System encompasses separately accredited institutions, a downtown medical district, and many other schools and programs, each of which nurtures an individual identity that is supportive of a single USF brand. Achieving national prominence and ensuring all audiences understand the success, diversity, opportunity and value of USF's brand begins with an intensive examination of the USF brand and a bold new strategy to add more value to that brand.

Ongoing research indicates that audiences will benefit from more understanding of USF's location, logos, other marks, and mission. Although potential students are surprisingly more aware of USF's marks and athletic programs than are parents, both of these demographics outside of Florida are opportunities for marketing regarding USF's location in the Tampa Bay area and the university's many accomplishments and recognitions as a high-end public research institution.



A strategic campaign is required, and this campaign should center on two primary efforts: 1) a consolidation and narrowing of the USF System's many marks, logos and templates; and 2) a brand placement and activation initiative to achieve national prominence, fully guided by continuous market research.

The USF System is currently using many different marks in a variety of formats as part of its marketing and communications, a characteristic that limits audience penetration and understanding of USF's brand, mission, accomplishments, and prominence. In short, the university is enabling many different brands rather than reinforcing one very strong brand. Consolidating the USF System's marks and focusing only on those that attract and reflect the predominance of stakeholders will help the university gain greater market penetration within a wider array of audiences.

In addition to its marks, the USF System should continue to employ in-depth market research to expand its understanding of opportunities, most productive language, imagery, and media. This research will guide understanding of the current brand, and the planning and development needed to achieve the university's future aspirational brand.

G. Information Technology

USF Information Technology's (IT) vision is to lead the use of disruptive technology to achieve the USF System goals. At our core is our mission - through a culture of excellence, we partner with the institutions to implement innovative and impactful technology across the USF System. Our agile culture is our strength and is the foundation for our team's processes and interactions. We embrace the values of focus, courage, openness, commitment, and respect.

Using transparent governance processes, our guiding principles will drive technology investment decisions and will lead us to focus on the success of the institutions, manage institutional risk, advance the institutional vision utilizing disruptive technologies strategically and ensure complete funding of initiatives and services.

In support of the USF System's strategic mission and goals, IT will partner with the USF community on the following goals:

Student Success – Create a globally accessible, digital ecosystem that transforms the student experience and supports student retention, timely graduation, and cost-effectiveness of education. This will be accomplished through modernization of our student information system; creation of internships and certificate programs, and use of predictive analytics and other strategic technologies to enhance student outcomes.



Research and Innovation – Provide the research community with technology solutions for world-class research. Accomplish this through implementation of efficient grant management solutions, expansion of innovative infrastructure, research and education facilitator programs, and a focus on pioneering emerging technologies.

Strategic Partnerships – Pursue local, national and global entrepreneurial partnerships to promote USF’s brand, create academic and research job opportunities for students, and establish new collaboration opportunities for the USF community.

Sustainable Economic Base – Develop transparent funding models that sustain core services, support innovation and facilitate growth. Seek opportunities that leverage commodity technology services to reduce institutional costs. Develop new revenue streams that leverage our existing expertise and talent. Provide technology solutions to support Responsibility Center Management (RCM) and other financial and operational reporting. Continually analyze existing technologies and retire those that are no longer viable.

Process Efficiencies – Leverage IT employees’ passion and expertise in process improvement frameworks including Scrum, Lean Six Sigma and Impact Mapping, as well as the platform of technology tools that enable efficiencies, such as intelligent business process management. Increase use and awareness of technology tools to improve the digital experience, increase self-service, and reduce work effort where possible. Seek opportunities to use digital assistants to scale services for a growing client base.

Patient/Provider Engagement – Create a superior patient and provider experience by leveraging cutting-edge technologies, including virtualized treatment, self-service, and self-help to improve satisfaction and quality outcomes.

Digital Foundation Transformation – Transform the underlying technology architecture to accommodate the digital ecosystem required by a world-class institution. Continue to improve the cybersecurity posture of the institution by using analytics, threat intelligence, and other innovative approaches. Prepare for a world of expanded digitization including electronic devices of all forms (“Internet of Things”) using new methods of IT operations to increase productivity. Adopt innovative talent management approaches to recruit and retain top-notch talent. Embrace a “cloud first” and “mobile first” strategy.

H. Finance and Administration

Committed to excellent financial stewardship and operating under the USF System’s Chief Operating Officer, the Finance and Administrative (F&A) systems provide efficient and effective services that support and enhance the core academic, research and public service missions of each USF System institution.



Centralizing many F&A functions, such as payroll, banking, and debt management, and allocating the costs proportionately eliminates unnecessary duplication of services and staff at each institution.

F&A supports the USF System Strategic Mission and Goals in a collaborative partnership through the following goals and initiatives:

- The University Controller’s Office safeguards institutional resources and provides effective and efficient accounting and operational support while ensuring compliance with all federal, state, and regulatory guidelines. This includes collecting and disbursing funds and providing accurate, timely, and complete periodic financial reports.
- Through leadership in strategic decision-making and technology-based solutions, Resource Management and Analysis delivers critical information guiding financial planning (including at a State level) thereby supporting the USF System’s goal of excellence and financial stability.
- The USF System’s Treasurer’s Office manages the investment portfolio and banking relationships across the USF System looking to maximize returns with minimal risk. In addition, this office provides guidance and support for major financial transactions such as the issuance of debt and other types of financing transactions.
- The Office of Human Resources optimizes the recruiting, training, and retention of employees. Its goal is to develop and administer an effective and efficient personnel program that delivers extraordinary customer service and the fair and equitable treatment of all employees.

Through efficient delivery of services such as those described above, finance and administration assist the institutions of the USF System in exceeding their goals.

I. Risk Management

The management of risk requires a delicate balance, dually serving the need to protect the USF System while avoiding the placement of onerous restrictions that stifle the ability to both grow and excel. The USF System utilizes a “Three Lines of Defense” model for the identification and management of risk. The first line of defense is at the operational level, where management is responsible for implementing a system of internal controls put in place to reduce the USF System’s exposure to financial, operational, strategic, compliance, and reputational risks. Management designs internal controls to promote efficiency, minimize risk of asset loss, help ensure the reliability of financial information and insure compliance with applicable laws, rules, and regulations. The Board of Trustees is responsible for setting institutional expectations for internal controls and ensuring executive leadership is aware of these expectations. Executive management is



responsible for working with their management teams to bring the expectations of the Board of Trustees to fruition. When areas of “High Risk” are identified, such as Research or IT, organizational units may also have embedded compliance officers who directly assist their management team in mitigating these risks.

Our second line of defense is the compliance oversight function provided by the USF System Compliance & Ethics Program. Utilizing risk assessment, compliance gap analysis, education and training, monitoring, and response to reported issues, this program provides centralized, coordinated compliance oversight. These USF System-level compliance and ethics oversight functions are performed in accordance with the Federal Sentencing Guidelines and Board of Governors Regulation 4.003 as well as the USF Compliance & Ethics Program Plan, approved annually by the Board of Trustees. The USF System Compliance & Ethics Program is responsible for providing assurance to the Board of Trustees and executive management that compliance and risk mitigation efforts at the operational level are effective and compliant.

Our third line of defense is the monitoring and independent assurance function provided by USF System Audit. Utilizing testing and other assurance modalities, USF System Audit is responsible for reviewing the adequacy of departmental and institutional internal controls and for reporting any weaknesses to the appropriate management team and the Board of Trustees.

Strategies for improving our risk management program are currently being identified and implemented. Such strategies include, but are not limited to, the following:

- Creation of a new Board of Trustees Committee to focus specifically on the USF System’s compliance, audit, and risk management programs.
- Closer integration of USF System Compliance and Ethics Program with unit-embedded compliance officers through the creation of “accountable reporting” lines to the USF System Chief Compliance Officer.
- Expanded compliance review of university policies and procedures.
- Creation of an Executive Compliance and Ethics Committee. This committee will review and evaluate significant multi-unit compliance or risk issues and determine appropriate mitigation strategies and resource impacts.

Finally, our risk management approach is not entirely about avoiding and mitigating risk through our lines of defense. An equally important element involves setting an appropriate organizational *risk appetite*—the determination by executive management and the Board of Trustees of the amount and type of risk that is acceptable in the pursuit of the USF System’s strategic objectives. Although appropriately conservative in the amount of *operational* risk that we accept, a



comparatively young, agile and vibrant institution such as USF must also embrace a certain amount of *strategic* risk to achieve its goals. Articulating the institution's appetite for risk is a critical component in aligning our risk management activities with strategic decision-making.

J. Athletics

By very definition, USF Athletics embraces the competitive spirit of the USF System, and seeks to be widely known for excellence, by helping student-athletes exceed their potential abilities.

USF Athletics has established five goals for the USF System athletic programs. Each goal is supported by specific strategies.

First, USF Athletics will achieve student-athlete academic excellence and success by providing a student-first learning environment, founded on ethics and integrity and dedicated to the academic, athletic, and post-graduation success of our diverse-body of student-athletes. Specific strategies to reach this goal will include:

- Enhancing student-athlete support services
- Developing programming and experiences to provide student-athletes every opportunity for career preparedness
- Collaborating with the Office of the Provost and Undergraduate Studies to continually ensure that all staff, coaches, and student-athletes are adhering to the academic integrity policies of the University
- Collaborating with System General Counsel to create a greater departmental awareness of NCAA, conference, and institutional rules and regulations

USF System Athletics will support the development of NCAA athletic programs at USFSP and USFSM within the appropriate divisional level. This could include: consultation, legal advice and fund raising support through the USF Foundation. In addition, Athletics will support intercollegiate athletics at USFSP and USFSM by:

- Ensuring and maintaining a safe environment for student-athletes free from hazing, harassment, sexual misconduct, and any other forms of harmful and inappropriate behavior
- Collaborating with the USF Office of Diversity, Inclusion and Equal Opportunity for completion of a gender-equity plan



The second goal of competitive greatness depends on having a Division I Athletic program that competes for conference championships and advance in NCAA post-season competition. To meet this level, we will:

- Provide all sport programs the necessary resources to compete successfully for conference championships
- Lead the conference in championships on an annual basis
- Recruit, develop and retain student-athletes and coaches
- Add a female sport program that is sponsored by our Conference
- Qualify all teams for NCAA postseason competition
- Lead the Conference in Learfield Sports Directors' Cup standings

For its third goal, USF Athletics will enhance its brand experience, gaining recognition as a premier college athletics program that provides first-class fan-engagement experiences for each sport with outstanding customer service. Specific goals and activities include:

- Providing a compelling, exciting and memorable game-day experience
- Ensuring consistent usage of all brand marks on uniforms, communications platforms, and facilities
- Utilizing a comprehensive annual marketing plan for all sports
- Creating partnerships with Tampa Bay sports leaders to enrich game day involvement
- Building upon partnerships with the student body and university leaders to continue boosting home game attendance

Fourth, we will expand and diversify revenue and resources increasing financial sustainability within the ever-changing landscape of intercollegiate athletics while remaining fiscally responsible. We will do this by:

- Establishing USF Athletics as a Direct Support Organization of the USF System
- Creating an Athletic Director Leadership Council consisting of community members and leaders to enhance strategic priorities
- Expanding upon existing donor stewardship programming to enrich experience for all support levels
- Maximizing market potential for multi-media rights and apparel

Fifth, USF Athletics will provide all athletics teams with state-of-the-art facilities that support the academic and competitive mission of the department while enabling student-athletes and coaches to maximize training, recruiting, and competition. We will:



- Design, renovate and/or construct a USF tennis facility, Student-Athlete Enrichment Center (SAEC), football team meeting room, and baseball/softball clubhouse
- Complete feasibility study for an on-campus football stadium

K. Government Affairs

Essentially all authority for the activities carried out by the USF System and its member institutions – as well as large portions of the annual operating budgets of each USF System institution – are provided by governmental entities at various levels. These include not only the hundreds of millions of dollars in direct cash assistance appropriated by the Florida Legislature and Governor each year to operate each USF System institution, but also:

- the authority to set, collect and expend student tuition and fees;
- the authority to conduct research and to expend research contract and grant revenue (especially research funded by the Federal Government) and retain and reinvest any proceeds derived from the R&D effort; and
- the authority to conduct, collect and expend auxiliary activities and revenues derived from them, such as residence hall and meal contracts, other vending on campus, operating a medical practice plan, and other like activities ancillary – but critical – to the successful operation of the three institutions.

Therefore, it is imperative that the USF System continue to have a coordinated and thoughtful approach to interactions with government at all levels to ensure success and continue the upward trajectories of the USF System and its institutions. The USF System’s Office of Government Relations operates as a shared service for each institution to ensure that all interactions with government are coordinated under the System President but are geographically displaced across the Tampa Bay Region to maximize buy-in from elected and appointed government officials in the local communities they represent. It further ensures that to the extent possible the USF System’s institutions are working in collaboration with each other on requests for government assistance and not in competition with one another, which would be short-sighted and ultimately detrimental to all. This approach has allowed the USF System to maximize its resources and has delivered results. By working together in a coordinated effort with local ties, the USF System has led the State University System of Florida (SUS) in the amount of new state construction dollars provided to any SUS institution over the most recent ten fiscal years.

Going forward, the level of direct cash assistance that governments will be able to provide to state universities across the nation is expected to decline; however the Florida Legislature and Governor Rick Scott have chosen to invest record levels of funding in the SUS and the USF System. This makes the necessity to continue to work together all the more critical and the ability to make record climbs in national rankings for USF System institutions all the more likely if strategically implemented. The USF



System Office of Government Relations is developing a plan to capitalize on the leadership positions that elected officials from across the Tampa Bay Region are expected to hold in local, state and federal government over the next eight years. These include mayors of local municipalities with ties to the USF System, key committee chairs and presiding officers of the Florida Legislature, a possible new Governor from the Tampa Bay Region in 2019, Members of Congress holding key leadership positions, and the President of the United States with a part-time residence in and close ties to Florida. The opportunities available to the USF System that these relationships present require an increased and dedicated level of effort in governmental relations with the probability of immense returns for the USF System in both new policy and funding initiatives.



V. Key Considerations for the Future of the USF System



V. Key Considerations for the Future of the USF System

During development of this plan, stakeholders provided feedback on both their current experience with the USF System, as well as their vision for optimizing the benefit of the USF System. This dialogue revealed certain key areas that present both opportunities and challenges. Following are areas where the advantage of a “system” is apparent. However, each also presents a unique set of challenges. Because of their critical importance to the USF System, each will be continuously assessed and solutions identified as this Plan undergoes adaptive strategic planning.

A. Reputation and Brand

The University of South Florida’s brand has evolved quickly over its 61-year history from a relatively unknown commuter university, to a trend-setting and highly respected public research institution. Although USF is known as a very attractive choice for Florida’s best and brightest aspiring scientists, physicians, researchers, engineers, business leaders and others, it may be a relatively unknown option for prospective out-of-state students. Market research indicates that many audiences throughout the United States are unaware of USF’s impressive academic and research records; some are even uncertain about USF’s location in Florida.

The USF System must embark on a branding campaign over the next three to five years to ensure that its reputation continues to grow, and even surpass, its objective measures of national and international achievement.

Special consideration should be given to create a system halo effect, while spotlighting the unique personalities of the institutions and major service areas

B. Criteria for New Degree Programs

The Florida Board of Governors closely regulates the addition of new degree programs so as not to unnecessarily duplicate course offerings/programs around the state. Based on a Board of Governors requirement, the USF System has its own guidelines for adding new programs. There must be:

1. Consistency of the program with the State University System Strategic Plan, the USF System Strategic Plan and the strategic plans of each of its member institutions (USF Tampa, USFSP, USFSM), with consideration of:
 - a. Demonstrated need for program graduates;
 - b. Demonstration that the program does not unnecessarily duplicate existing State University System (SUS) degree programs;
 - c. Sufficient financial planning and resources for implementation;



- d. Projected benefit of the program to the university, local community and state;
- e. Institutional need for core academic programs that support the mission of the university and provide an academic base expected of graduate degree granting institutions of higher learning; and
- f. Maintenance of access and articulation for all programs within the SUS and the Florida College System (FCS) for baccalaureate degree programs, with notification throughout the SUS and FCS as designated by the BOG.

2. Institutional Readiness as demonstrated by:

- a. The ability to implement a high-quality program
- b. A curriculum appropriate for the discipline and program level
- c. Sufficient qualified faculty
- d. Sufficient institutional resources

C. Synergies and Economies of Scale

The USF System has a number of services that are shared across the institutions. Some of these are located at USF Tampa, while others are direct support organizations that report to the USF System President with the Board of Trustees providing fiduciary oversight.

By sharing resources, the institutions can more affordably access a robust palette of resources, such as library journal licenses, information technology, general counsel, and administrative services. Each institution is charged back for these services through a rubric that is negotiated and agreed upon every five years, in accordance with the USF System Governance Policy # 07-001.

D. Accreditation, Legislative Funding and Governance

The Florida Board of Governors requires the institutions to report Work Plans, Annual Accountability reports and State University System Performance Based Funding metrics as a single entity - the USF System. As such, when Performance Based Funding is determined, which is an increasingly large component of each institution's budget, the performance of one institution can have a significant effect on the total allocation for the USF System.

Conversely, the institutions of the USF System have different internal reporting structures as is required for each by SACSCOC. The accrediting agencies require



each institution to report independently to the USF System President and Board of Trustees, as if it was a standalone organization. Similarly, the Florida State Legislature funds each institution and, to some extent, USF Health, in a separate line item budget.

E. Collaboration

While the departments, colleges and institutions within the USF System collaborate today, greater collaboration is not only possible, it is desirable. Institutional barriers are being reduced by technology, but more needs to be done to accelerate the connectivity among faculty, staff, and students.

The new USF Health Collaborative is an excellent example of cross-institution collegiality, System-level planning and sharing of expertise. The Collaborative convenes all the health stakeholders across the USF System to partner on research, training, and care.



VI. The System Institutions



VI. The System Institutions

A. Descriptions of the Institutions

Below is a brief description of each of the three institutions of the USF System as provided in their respective current strategic plans.

USF Tampa

The University of South Florida Tampa (USF Tampa) is a major metropolitan research university located in the heart of the Tampa Bay region. Founded in 1956, USF Tampa was the first independent state university conceived, planned and built in the 20th century. With a current enrollment of more than 40,000 students, the university has made incredible strides in 61 years, developing into one of the nation's leading research institutions dedicated to:

- Student access, learning, and success through a vibrant, interdisciplinary, and learner-centered research environment incorporating a global curriculum.
- Research and scientific discovery to strengthen the economy, promote civic culture and the arts, and design and build sustainable communities through the generation, dissemination and translation of new knowledge across all academic and health-related disciplines.
- Partnerships to build significant locally- and globally-integrated university-community collaborations through sound scholarly and artistic activities and technological innovation.
- A sustainable economic base to support USF's continued academic advancement.

USF-Tampa has significant objective evidence that it is fulfilling its mission and goals:

- Designated as the first “Emerging Preeminent State University” in Florida, by the Florida Board of Governors in June 2016.
- Ranked No. 1 in the state of Florida and No. 6 in the nation in Black Student Success for eliminating the completion gap between white and black students.
- Recognized as a Top 50 public research university by multiple publications (TARU, ARWU, Times Higher Ed).
- First in the State University System of Florida in research funding per full-time faculty member.
- One of 40 public research universities nationwide with “very high research activity” that is designated as “community engaged” by the Carnegie Foundation for the Advancement of Teaching.
- Nine graduate programs are ranked among the top 50 according to the 2017 *U.S. News & World Report* Graduate School Rankings.



USF St. Petersburg

USF St. Petersburg (USFSP) was founded in 1965 and serves approximately 7,000 students, providing a top-tier option for students and families who want a more personalized campus experience. Well over 20,000 graduates have passed through its doors.

USFSP serves as an anchor for the downtown business district and a cornerstone of the City's Innovation District. USFSP is Pinellas County's only residential, public, research-active university, offering more than 40 undergraduate and graduate programs in three colleges: Arts and Sciences, Business, and Education. In 2016, *U.S. News & World Report* ranked USFSP 24th among Southern Regional Public Universities.

During the 1980s and 1990s, USFSP's reputation grew, and distinctive, new programs attracted students from across the country. In 2006, USFSP earned separate accreditation by the Commission on Colleges of the Southern Association of Colleges and Schools. Now classified as a Master's Medium Institution by the Carnegie Commission on Higher Education, USFSP has also earned the elective Carnegie Classification of Community Engagement.

USFSP's Kate Tiedemann College of Business has earned AACSB International accreditation in both business and accounting, a distinction held by less than two percent of all business schools worldwide. The College of Education is accredited by the National Council for Accreditation of Teacher Education (NCATE) standards through the Council for the Accreditation of Educator Preparation (CAEP) Accreditation System, and the Department of Journalism and Media Studies earned reaccreditation in 2016 by the Accrediting Council on Education in Journalism and Mass Communications (ACEJMC) for both undergraduate and graduate programs, including its online Master's program in digital journalism and design, one of only ten completely online accredited Master's degrees in the country.

USF Sarasota-Manatee

In 1974, the University of South Florida began offering evening courses in education, business, and liberal arts at six locations in Manatee and Sarasota counties. The Florida Legislature officially designated USF Sarasota-Manatee as a branch campus of USF in 1975. Throughout the 1980s and 1990s, the campus offered courses during the evening to serve part-time, commuter students with Associate's degrees working toward Bachelor's degrees in Arts & Sciences, Business, and Education. Master's degree offerings followed.



USF Sarasota-Manatee received separate budget authority in 2001, which established it as a distinctive member of the USF System. Five years later, USF Sarasota-Manatee moved from a shared space arrangement with New College of Florida to its own campus located on the Sarasota-Manatee county line.

In 2011, as required by state law, USF Sarasota-Manatee (USFSM) achieved separate regional SACSCOC accreditation to meet student demand and local needs. USFSM admitted its first freshman class and opened its first science laboratories on the campus of Mote Marine Laboratory in August 2013. The College of Business earned its own accreditation by AACSB in 2014 while USFSM Education programs received NCATE accreditation in 2015.

With approximately 2,000 students, USFSM is a comprehensive, non-residential regional university that serves Charlotte, Desoto, Manatee, and Sarasota Counties primarily. USFSM provides a high-quality bachelor's and master's-level education in a personalized learning community that prepares successful leaders and responsible citizens. The university remains student-centered, research-focused and community-engaged with significant economic and cultural impact in the region.

B. Strategies of the Institutions

Each of the three institutions has developed its own strategic plan which reflects its unique identity, vision, and aspirations. The aforementioned USF System goals must be understood not in a vacuum, but as a resolute intent to help each institution execute their respective plans. Below is a summary of the plans. Also included below may be content from each institution's prior work plans (submitted annually to both the USF BOT and the SUS BOG to provide a narrative update on the strategies being used to meet each institution's Strategic Plan). A link to their complete strategic plans can be found in the appendix of this document.

1. USF Tampa

As USF Tampa moves forward in positioning itself for AAU eligibility, it maintains its focused commitment to student success, along with embracing scholarship, research, innovation, community collaboration, and economic development at all levels, including USF Health. The foundation of its strategy is accountability, guided by the Board of Governors' Strategic Plan, USF Tampa's Strategic Plan and the Board of Governors' performance-funding model. By benchmarking progress to our current and aspirational peer institutions, a clear roadmap guides USF Tampa toward further excellence and, ultimately, AAU membership. Examples of key initiatives:



- USF Tampa continues to focus on the delivery of high quality, relevant and globally-informed academic programs to prepare graduates for leadership roles and workforce opportunities locally and across the world. USF Tampa’s commitment to its global focus through its Quality Enhancement Plan for SACS reaccreditation has gained momentum and engaged faculty, students and staff university-wide. This initiative continues to work to enhance curriculum across USF Tampa with global, cross-cultural perspectives and to ensure that every student has an opportunity for a global experience—whether through a technology-enabled global classroom, a study abroad experience or meaningful interactions with international students and cultures.

- USF Tampa’s commitment to producing high-impact research and innovation has resulted in an increase in its efforts to recruit and retain research-productive new faculty. It also intensified its encouragement of undergraduate research that contributes to an overall positive education experience and enhanced student success. In addition, USF Tampa has implemented interdisciplinary initiatives to solve critical problems; provides training to increase external funding and continues to promote partnerships across the university and within the broader community.

- USF Tampa’s focus on partnerships strengthens the Tampa Bay region and Florida as part of the global landscape. USF Tampa continually works to maximize efficiencies and use its resources in the most prudent ways possible—especially given the valued new infusion of performance-based funding investments. USF Tampa continues to work closely with its partners in the Florida Consortium of Metropolitan Research Universities—the University of Central Florida and Florida International University. The group has enjoyed great support from national grant-makers, notably the Helios Foundation, the Helmsley Charitable Trust and the Kresge Foundation. By sharing and developing best practices in predictive analytics, targeted support, high tech pathways and career readiness, the Consortium will continue to add value to the student success initiative at USF Tampa.

2. USF St. Petersburg

Initiatives at USFSP focus on the following strategic goals: enhancing student success and strengthening enrollment; communicating our distinctiveness and attracting students who are interested in USFSP as their destination of choice; improving student and employee diversity profile; investing in faculty excellence in research and innovative teaching; expanding strategic partnerships, building our infrastructure and ensuring financial sustainability. Specific strategies include:



- Developing a master academic plan outlining new programming for the next five years – one that envisions expanding the curriculum and developing new majors aligned with our strategic plan and responsive to the areas of strategic emphasis to meet regional, state and global needs while providing core academic programs that support the university's distinction as a regional comprehensive master's granting university.
- Fostering a culture of completion by increasing student persistence and timely progression to degree attainment through campus-wide support; delivering quality academic advising and holistic career development increasing opportunities for personalized learning experiences and internships and providing completion scholarships.
- Developing an intercollegiate athletics program in response to growing student interest in University athletics.
- Building adequate facilities to support our mission, programs and continued planned growth of our residential campus.
- Developing and implementing a Diversity Action Plan.
- Expanding philanthropic support by developing a fundraising strategy anchored to institutional priorities while continuing our success in obtaining legislative funding for those priorities.
- Ensuring that all USFSP students are globally prepared by providing affordable education abroad opportunities and daily interaction with international students which will comprise 10 percent of our student headcount.
- Providing input into the creation of USFSP logos for inclusion in the visual identity and graphic standards manual.
- Communicating to potential donors and partners to build the reputation of USFSP to tell the success stories and achieve our enrollment and fundraising goals.

3. USF Sarasota-Manatee

To prepare successful leaders and responsible citizens, USFSM has developed several key strategies to support the mission of providing high quality bachelor's and graduate-level education and scholarly activity in a personalized learning community. To meet this mission, strategic goals include: strengthening student success and student retention; advancing a culture of campus engagement; intentional enrollment management; enhance teaching and learning; support diverse scholarly activity, engage with the community and grow and diversify campus resources.

Specific strategies include:

- Enhancing student support services through early intervention, advising and the creation of career maps.



- Establishing dedicated space for student use and improving off-campus housing and academic program needs to better support student engagement on campus.
- Developing an enrollment management system to ensure sustainable growth in programs while also meeting market needs.
- Exploring and implementing innovative technologies, pedagogical methods and experiential opportunities such as international education opportunities, internships and service learning courses that increase student engagement in the learning process and improve student learning outcomes.
- Implementing a campus-wide community engagement plan that cultivates strategic partnerships to better serve the community in a mutually beneficial way.
- Creating financial sustainability through broadened external fundraising activities, supporting programs, endowments, sponsored research and partnerships while also leveraging shared-service-type arrangements to manage resources responsibly.



VII. Conclusion



VII. Conclusion

The USF System has established a strong foothold since its inception slightly more than a decade ago. Its member institutions and key capabilities have flourished, while the reputation of each has continued to be burnished. However, progress can be even more marked and timely. The USF System seeks to provide servant-leadership to its members, by providing a platform for greater collaboration, services and capabilities that help each institution reach never-imagined heights, while fostering an engaged community that is vested in its perpetual success.



VIII. Appendix



VIII. Appendix

A. Links to Cited Materials

a) USF Tampa 2013-2018 -

<http://www.usf.edu/ods/documents/strategicplans/usf-strategic-plan-2013-2018.pdf>

b) USFSP – adopted September 2014 -

https://www.usfsp.edu/vision2020/files/2014/09/USFSP_stratplan.pdf

c) USFSM – Draft for 2015-2020 - [http://usfsm.edu/wp-](http://usfsm.edu/wp-content/uploads/2015/01/USFSM_StrategicPlan_2015_06_04.pdf)

[content/uploads/2015/01/USFSM_StrategicPlan_2015_06_04.pdf](http://usfsm.edu/wp-content/uploads/2015/01/USFSM_StrategicPlan_2015_06_04.pdf)

d) Governance Policy - <http://regulationspolicies.usf.edu/policies-and-procedures/pdfs/bot-policy-07-001.pdf>

B. Strategic Plan Development Process and Timeline Materials



Strategic Plan Development Process

On August 11, 2016, the USF Board of Trustees and President Judy Genshaft discussed the strategic direction of the USF System. Soon afterwards, the Board of Trustees Strategic Initiatives Committee, as well as President Genshaft, charged SVP for Strategic Development and COO of USF Health, Dr. Edmund Funai, with creating a committee to develop a dynamic USF System Strategic Plan. In September 2016, President Genshaft invited select Faculty and Staff to participate in this committee. The invitation letter is below.

EXHIBIT A: LETTER TO PARTICIPATE IN THE STRATEGIC PLANNING COMMITTEE



September 25, 2016

Mr. XXXXX
Mail Point XXXX

Dear XXXX,

It is with great pleasure that I invite you to serve on the USF System Strategic Planning Committee (SPC). At the first meeting I will charge the committee with creating an USF System strategic plan that aligns USF System's overall mission and vision with the individual plans of each of the different colleges and units within the USF System. This is a wonderful opportunity to put our newly articulated BULLISH values into practice; to develop a system plan that helps make each of our institutions greater than the sum of its parts. We also plan on addressing system issues not currently in extant plans, such as branding, technology, and community engagement.

I have asked Dr. Ed Funai, Sr. VP for USF System Strategic Development and Dr. Perry Schoon, ACE Fellow to co-chair the committee. The composition of the committee will reflect the USF System's commitment to diversity, inclusiveness, and equal opportunity. In addition, it will also have numerous *ad hoc* members representing areas that developed strategic plans in the past several years.

I would appreciate your assistance and collaboration in this exciting endeavor. Please let us know if you agree to participate by contacting April Ingram at ingram@health.usf.edu or (813) 974-2232, by October 15, 2016. We look forward to seeing you soon to begin this very important work.

Sincerely,
Judy Genshaft
USF System President

Cc: Dr. Funai



EXHIBIT B: STRATEGIC PLANNING COMMITTEE MEMBERS

USF System Strategic Planning Committee members

Roberta Burford	John Robinson
Bill Carlson (Tucker Carlson)	Dr. Perry Schoon
Dr. Terry Chisolm	Dr. Sandra Stone
Dr. Ed Funai	Dr. Cindy Visot
Dr. James Garey	Mark Walsh
John Long	Dr. Sophia Wisniewska
Dr. Terry Osborn	Dr. Karen Holbrook
Carole Post	
Steve Prevaux	

USF System Strategic Planning sub-writing committee

Bill Carlson (Tucker Carlson)

Dr. Ed Funai

Carole Post

Steve Prevaux

John Robinson

Dr. Perry Schoon

Dr. Cindy Visot

April Ingram

Paige Beles Geers



EXHIBIT C: STRATEGIC PLANNING SCHEDULED PLANNING EVENTS

<u>Meeting Dates</u>	<u>Meeting Times</u>	<u>Meeting Location</u>
Tuesday February 21 st (Writing)	1-3	Provost's Conference Room
Monday February 27 th	1-3	President's Conference Room
Monday March 6 th (Writing)	1-3	CMS, 3007
Monday March 27 th	1-2	President's Conference Room
Monday March 27 th (Writing)	2-3:45	President's Conference Room
Monday April 17 th (Writing)	1-3	Provost's Conference Room
Friday April 21 st	3:30 -5	President's Conference Room
Monday May 8 th (Writing)	1-3	Patel, CGS 302
Tuesday May 23 rd (Writing)	3-4	President's Conference Room
Tuesday May 23 rd	4-5	President's Conference Room
Friday June 2 nd	3:30 – 5	HOLD Possible final meeting
Thursday June 8 th	9:30 – 12:30	BOARD MEETING – MSC



EXHIBIT D: STRATEGIC PLANNING TIMELINE

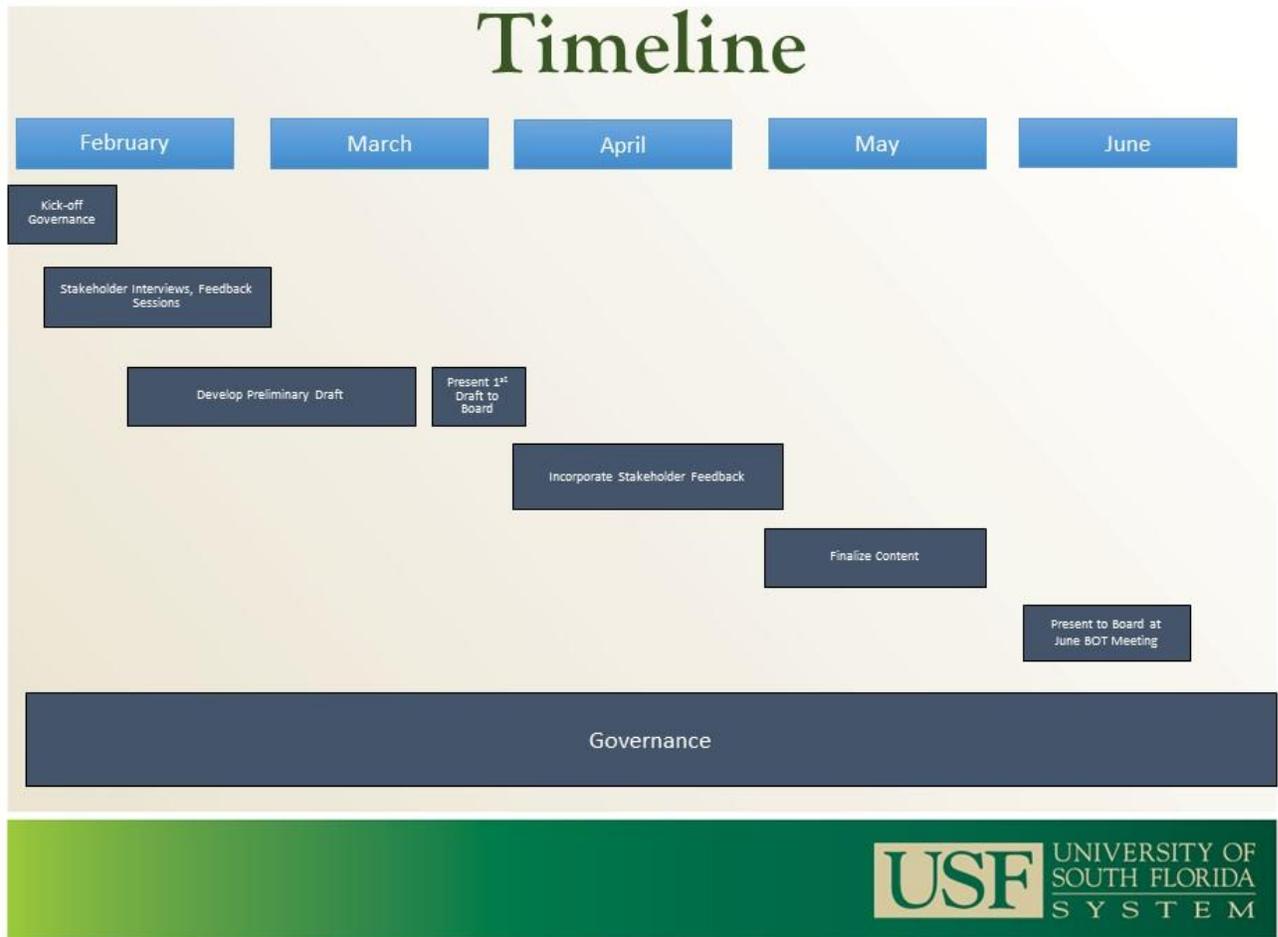


EXHIBIT E: STRATEGIC PLANNING PROCESS OUTLINE

Process

1. Refine outline and develop content based on:
 - Identification/analysis of key stakeholders
 - Existing Campus Strategic Plans
 - 2017 Strategic Plan Committee Recommendations (USF System leadership, including Regional CEOs)
 - Individual feedback and direction from each Trustee and Regional CEO
2. Facilitation of writing process by Bill Carlson (Tucker Hall) and the Strategic Plan Writing Sub-Committee



EXHIBIT F: STRATEGIC PLANNING STAKEHOLDERS AND INTERVIEWEES

Stakeholders and Interviewees

Trustees

President Judy Genshaft
Brian Lamb (Chair)
Scott Hopes
Michael Carrere
Stephanie Goforth
Jim Stikeleather (Trustee Liaison)
Jordan Zimmerman (Vice Chair)
Hal Mullis
James Garey
Stanley Levy
John Ramil
Byron Shinn
Nancy Watkins

Stakeholders/Interviewees

Provost Wilcox
Regional Chancellor Sophia Wisniewska
Regional Vice Chancellor Terry Osborn
Dr. Paul Sanberg and Judy Lowry (Research)
Joel Momberg, Dr. Ed Funai and Dr. Paul Sanberg
(Community Development)
Mark Harlan (Athletics)
Sidney Fernandes (IT)
Kathleen Moore
Jose Hernandez (Diversity)
Gerard Solis, John Long and Jeff Muir (Risk
Management)
John Robinson and Dr. Funai (Branding)
Helen Levine
Casey Welch

