

USF Board of Trustees Strategic Initiatives Committee

Tuesday, August 23, 2022 Time: 11:30AM-12:00 PM Microsoft Teams Virtual Meeting

Trustees: Michael Carrere, Chair; Rogan Donelly, Shilen Patel, Fredrick Piccolo

AGENDA

I.	Call to Order and Comments	Chair Michael Carrere
II.	Public Comments Subject to USF Procedure	Chair Carrere
III.	New Business – Action Items	
	a. Approval of May 31, 2022 meting notes	Chair Carrere
IV.	New Business – Information Items	
	a. Progress Update Towards Implementation of the USF 2022-2027 Strategic Plan	Terry Chisolm Pritish Mukherjee Valeria Garcia
V.	Adjournment	Chair Carrere

USF Board of Trustees Strategic Initiatives Committee Meeting May 31, 2022 Teams Meeting

I. Call to Order and Comments

Chair Carrere called the meeting to order and welcomed the committee members and other members of the Board of Trustees.

II. <u>Public Comments Subject to USF Procedure</u>

There were no requests for public comment.

III. New Business – Action Items

a. Approval of February 22, 2022 meeting notes

The meeting notes were approved unanimously.

IV. <u>New Business – Information Items</u>

a. Implementation of the USF 2022-2027 Strategic Plan

Chair Carrere introduced the item as an important update on the Strategic Plan which was recently presented to and approved by the Board of Governors. He noted the strategic plan is on track for implementation at the start of the fiscal year on July 1, thanks to the hard work by the co-chairs of our implementation advisory committee, Drs. Terry Chisolm and Pritish Mukherjee, the Strategic Planning Implementation Committee and the various planning officers from across the university. He explained that the entire process of creating and preparing to implement the strategic plan has been one that spans both the breadth and depth of the entire university—and one that has been transparent and inclusive.

Chair Carrere noted that this critically important process is being conducted in tandem with the President's new vision for a university-wide budget process. While the budget process is not yet complete, that process and the strategic plan implementation are running on parallel tracks—with both groups of leaders and advisors contributing to the success as a whole.

Chair Carrere then asked Terry Chisolm, Vice Provost for Strategic Planning, Performance & Accountability and Pritish Mukherjee, Vice Provost & Associate Vice President and Strategic Talent Recruitment, University Reputation and Impact to begin the presentation. They presented a slide deck overviewing the implementation strategy for the Strategic Plan.

Dr. Mukherjee went on to explain the work that has been done since the Board of Trustees received their last update. Tracking the success of the plan is critically important and will be done so through a proposed set of distilled primary and support metrics. The Planning Officers from across the university have developed unit-specific strategies and tactics that align with the measures of success. Finally, the plan continued to be guided by input from the Strategic Planning Implementation Advisory Committee.

Dr. Mukherjee explained how the distilled metrics came to be through university consultation and a survey mechanism with the Strategic Planning Implementation Advisory Committee. The results produced a set of metrics that helped focus the document into primary and supporting metrics. The primary metrics are intended to respond to the needs USF has from an aspiration perspective including Top 25, PBF, Preeminence metrics, etc. which allowed the primary metrics being distilled to 1/3 of the original metrics proposed. He went on to explain various themes that have also been indentified for each of the goals.

Dr. Mukherjee described the work of the Planning Officers and the process for developing unit-specific strategies and tactics. He noted that he and Dr. Chisolm engaged in weekly planning meetings with the Committee of USF Planning Officers to ensure questions were answered and guidance was provided. Additionally, a fillable pdf form was developed to gather unit-level strategies and tactics aligned with the measures of success for all 5 goals of our Strategic Plan. The Unit Planning Officers engaged broadly with their respective stakeholders to provide extensive strategies and tactics aligned with their unit's strategic aspirations. Final input was received by May 13, 2022 and the cumulative output has been condensed in a draft of institutional "Super-Strategies" for our Strategic Plan. These are aligned with the themes for each of our goals.

Dr. Chisolm provided a brief overview of next steps including the need to confirm a concise set of "primary" metrics for high level monitoring by theme (aligning with PE, PBF, USNWR Top-25, AAU, community priorities), working through information governance processes for metric definitions, stabilizing data sources as needed, and creating publicly available visualizations for monitoring planning & performance.

Dr. Chisolm closed the presentation by noting the enthusiasm the committee and university stakeholders have shown with their engagement and how ready they are to implement the plan to continue USF's forward momentum.

President Law provided her thanks for the tremendous amount of work that has been done and Trustees Patel and Piccolo echoed the President's remarks.

V. Adjournment

Chair Carrere thanked Drs. Mukherjee and Chisolm and the rest of the Strategic Plan Implementation Advisory Committee for their thoughtful and productive work and adjourned the meeting.

IN PURSUIT OF EXCELLENCE

Progress Toward the Implementation of the USF Strategic Plan: *In Pursuit of Excellence* 2022-2027

Presented to USF Strategic Initiatives Committee, USF Board of Trustees

Pritish Mukherjee, Terry Chisolm & Valeria Garcia Provost's Office

August 23, 2022









Strategic Plan – Timeline

12/07/21
USF BOT Approves
In Pursuit of Excellence
2022-2027 Strategic Plan

01/26/22 SUS BOG Approves USF's In Pursuit of Excellence 2022-2027 Strategic Plan

02/03/2022 Implementation Advisory Committee (IAC) Formed 02/25/2022 Unit Planning Officers (UPOs) Identified

06/15/2022
Strategies &
Tactics submitted
to President for
review & approval

06/01/2022
Summarized
Strategies & Tactics
submitted to IAC for
10-day review

05/31/22 Update to BOT Strategic Initiatives Committee 05/13/2022
Unit Strategies &
Tactics submitted
for summary &
alignment

03/08/2022
Internal Units
initiated
development of
Strategies & Tactics

7/1/2022 Implementation of Strategic Plan begins 8/23/22 Update to BOT Strategic Initiatives Committee

2023

2024

2025

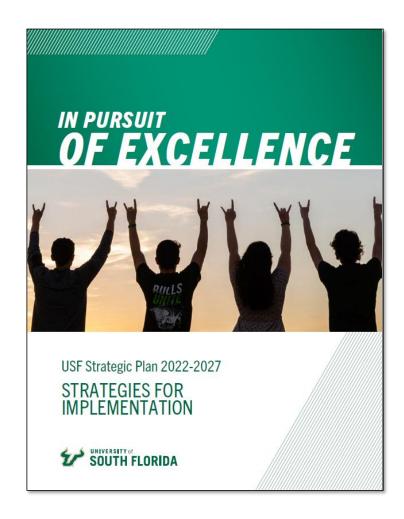
2026

2027

- High level update on Strategies & Tactics
- Update on the Primary Metrics & Sample Scorecard
- Next steps

Development of Strategies & Tactics

- ❖ The Planning Officers Committee was constituted on February 25, 2022.
- ❖ Co-chairs met with Planning Officers on a weekly basis for a total of 7 meetings to orient the Committee, define the task, and provide data to facilitate their work to identify unit level strategies and tactics aligned with measures of success.
- The Planning Officers met with stakeholders in their various units to collect feedback using a fillable PDF that was created for each unit.
- On May 13th, this resulted in the submission of over 150 pages of input on strategies and tactics from units.
- The cumulative unit-level strategies were condensed to institutional strategies and organized by the 13 identified themes for each goal.
 - Shared with the Implementation Advisory Committee
 - ❖ Submitted to President Law for review prior to the first steps for implementation of *In Pursuit of Excellence* Strategic Plan 2022-2027



APPENDIX A: STRATEGIC PLAN IMPLEMENTATION ADVISORY COMMITTEE

- Dr. Theresa Chisolm, Co-chair; Vice Provost for Strategic Planning, Performance and Accountability
- Dr. Pritish Mukherjee, Co-chair; Vice Provost and Associate Vice President Strategic Talent Recruitment, University Reputation, and Impact; Professor of Physics
- Ms. Jessica Burgess, President, Administrative Advisory Council
- Ms. Moniquie Brown, President, USF Staff Senate
- Mx. Willow Craine, Graduate and Professional Student Council Vice President
- Dr. Andrea Ellis, American Council on Education Fellow
- Dr. Valeria Garcia, Associate Vice President of Decision Support
- Ms. Palge Geers, Acting Chief of Staff
- Dr. Moez Limayem, Lynn Pippenger Dean, Muma College of Business
- Dr. Usha Menon, Senior Associate Vice President, USF Health; Dean, College of Nursing
- Dr. Alexis Mootoo, Assistant Vice President, Resource Management & Development, Student Success
- Dr. Zacharias Pieri, Associate Professor of International Relations and Security Studies, College of Arts and Sciences
- Dr. Anthony Rolle, Dean, College of Education
- Dr. Charles Stanish, Professor of Anthropology, College of Arts and Sciences; Executive Director, Institute for the Advanced Study of Culture and the Environment
- Mr. Richard Sobieray, Senior Associate Vice President and Chief Financial Officer for USF Health, Vice Dean of Business and Finance for Morsani College of Medicine
- Dr. Melanie Riedinger-Whitmore, Professor, Department of Integrative Biology, College of Arts and Sciences
- Dr. Stephen Stark, Professor and Chair, Department of Psychology College of Arts and Sciences
- Ms. Ilana Thomsett, Academic Services Administrator
- Ms. Tanya Vomacka, Director of Strategic Communications and Engagement
- Ms. Jillian Wilson, Student Body Vice President

APPENDIX B: PLANNING OFFICERS COMMITTEE

Co-Chairs: Dr. Pritish Mukherjee and Dr. Theresa Chisolm

Executive Services

ı	Audit	Ms. Kate Head
ı	Campus and University Executive Offices	Dr. Michelle Madden, Dr. Brett Kemker, Ms. Paige Geers
ı	Compliance and Ethics	Mr. Terry Nealy
ı	Diversity, Equity, and Inclusion	Dr. Elizabeth Hordge-Freeman
ı	General Counsel	Ms. Brittany Dix

Academic Affairs Colleges and USF Libraries

College of the Arts	Dr. Karen Frank
College of Arts and Sciences (Schools of Social Sciences, Humanities, and Natural Sciences and Mathematics)	Ms. Erin Sutliff, Dr. Brian Connolly, Ms. Erin Jensen
College of Behavioral & Community Sciences	Ms. Patricia Cleveland
Muma College of Business	Dr. Gert-Jan de Vreede
College of Education	Dr. Kathy Bradley-Klug
College of Engineering	Dr. Sanjukta Bhanja
Patel College of Global Sustainability	Dr. Joseph Dorsey
Judy Genshaft Honors College	Dr. Benjamin Young
College of Marine Science	Dr. Gary Mitchum
USF Libraries	Mr. Terry Hutchings

Administrative and Support Units

Administrative Services	Ms. Jennifer Fleischman
Advancement & Alumni Affairs	Ms. Pam Prado
Business and Finance	Ms. Jennifer Condon
Communications and Marketing	Mr. Adam Freeman
Graduate Studies	Dr. Ruth Bahr
Human Resources	Ms. Angie Sklenka and Ms. Sheri Neshiem
Information Technology	Ms. Carrie Purol
Innovative Education	Ms. Stephanie Harff
Office of Decision Support	Dr. Valeria Garcia
Athletics	Ms. Kris Pierce
Provost's Office	Dr. Pritish Mukherjee
Research and Innovation	Dr. Michael Bloom
Student Success	Dr. Carmen Goldsmith
USF Health/Colleges	Dr. Jacqueleen Reyes Hull
USF World	Dr. Kiki Caruson

Themes Identified for Strategic Plan Goals

GOAL 1: Student success at USF and beyond

To promote the success of well-educated, highly skilled, and adaptable alums who, as lifelong learners, lead enriched lives, contribute to the democratic process, function as engaged community citizens, and thus thrive in a dynamic global market.

- » REPUTATION & STUDENT CALIBER
- » PROGRESSION & COMPLETION
- » CAREER OUTCOMES

GOAL 2: Faculty excellence in research and innovation

To conduct high-impact research and innovation to advance frontiers of knowledge, solve global problems, and improve lives.

- » FACULTY & RESEARCH STAFF
- » RESEARCH EXPENDITURES & ECONOMIC IMPACT
- » IMPACT OF RESEARCH & SCHOLARSHIP

GOAL 3: Partnerships and engagement with local, national, and global impact

To be a major social and economic engine creating robust global, national, and regional partnerships to build a prosperous and sustainable future for our regional communities and the state of Florida.

- » LOCAL & COMMUNITY ENGAGEMENT
- » NATIONAL & GLOBAL PARTNERSHIPS

GOAL 4: A great place to work, learn, and discover for a diverse and inclusive USF community

To provide a safe, inclusive, and vibrant community for learning, discovery, creative activities, and transformative experiences enabled through adaptive design of physical, social, and digital environments.

- » PROFESSIONAL DIVERSITY & SUCCESS
- » STUDENT DIVERSITY & OUTCOMES

GOAL 5: A strong, sustainable, and adaptable financial base

To practice continuous visionary planning and sound stewardship throughout USF to ensure a strong and sustainable financial base and adapt proactively to emerging opportunities in a dynamic environment.

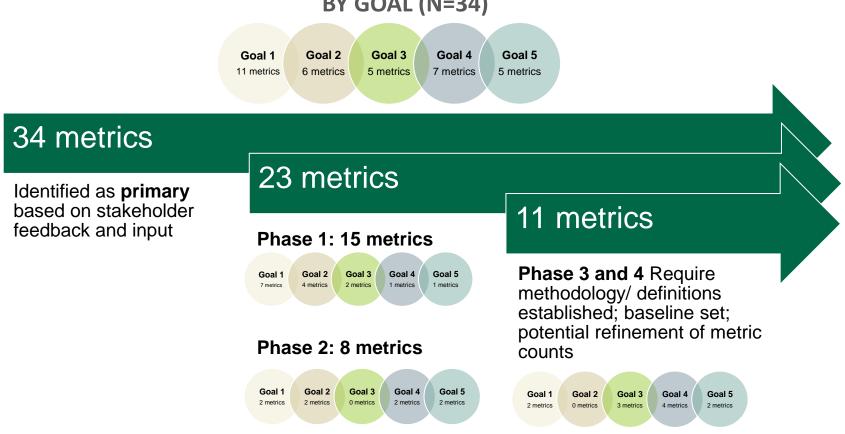
- » TRANSPARENT & SUSTAINABLE BUDGET
- » DIVERSIFICATION OF REVENUE STREAMS
- » OPERATIONAL EFFICIENCY

Goal 2: Faculty Excellence in Research & Innovation

(Strategies in Gold Boxes and Primary Metrics in Teal Boxes under Themes)

	FACULTY & RESEARCH STAFF			
1. 2.	Increase postdoctoral appointees Target recruitment and development to enhance research and innovation	Percent of Tenured/ Tenure track faculty Number of postdoctoral appointees		
	RESEARCH EXPENDITURES & ECONO	OMIC IMPACT		
3.	Improve effectiveness, speed and transparency of sponsored research processes and systems	Total R&D expenditures (\$M) Federal R&D expenditures (\$M)		
4.	Increase research infrastructure and capacity	 Economic impact of research funding (all 		
5.	Enhance support for submission and administration of competitive grant proposals	sources) (\$M)		
6.	Establish and promote collaborative research with local, national, and global partners, and enhance revenue generation in strategic areas of research expertise			
7.	Foster an environment conducive to enhance research and innovation			
8.	Develop strategic research clusters at USF focused on emerging areas of significance			
9.	Strengthen internal support structures and procedures to facilitate transdisciplinary research			
IMPACT OF RESEARCH & SCHOLARSHIP				
10.	Increase the visibility of scholarship and support scholars at USF	 Number of publications, citations, and 		
11.	Increase the impact of USF's research and scholarship	creative work through collaborations		
12.	Elevate quality and quantity of peer- reviewed publications & scholarly work	Number of faculty awards Normalized citation impact		
13.	Enhance prestigious faculty awards and national recognition			
14.	Elevate programs to top quartile of their disciplinary field			
15.	Increase collaborations and publications with faculty/students between colleges			
16.	Increase economic impact of USF's research and scholarship			

DISTILLED PRIMARY METRICS FOR MEASURING SUCCESS OF THE STRATEGIC PLAN BY GOAL (N=34)



DISTILLED PRIMARY METRICS FOR MEASURING SUCCESS OF THE STRATEGIC PLAN BY THEME (N=34)

GOAL 1: STUDENT SUCCESS AT USF AND BEYOND (N=11) GOAL 2: FACULTY
EXCELLENCE IN RESEARCH
AND INNOVATION (N=6)

GOAL 3: PARTNERSHIPS AND ENGAGEMENT WITH LOCAL, NATIONAL, AND GLOBAL IMPACT (N=5) GOAL 4: A GREAT PLACE TO WORK, LEARN, AND DISCOVER FOR A DIVERSE AND INCLUSIVE USF COMMUNITY (N=7) GOAL 5: A STRONG, SUSTAINABLE, AND ADAPTABLE FINANCIAL BASE (N=5)

REPUTATION & STUDENT CALIBER

- Average GPA (Incoming)
- Average SAT scores

PROGRESSION & COMPLETION

- FTIC Retention Rate
- 6-Year FTIC graduation rate (FT/PT)
- 3-Year FCS AA Transfer graduation rate (FT/PT)
- Percent of Bachelor graduates completing HIPs
- · Enrollment in Study Abroad
- Enrollment in Service-Learning Courses
- Student Participation in Experiential Learning programs
- Percent of Undergraduates Engaged in Research

CAREER OUTCOMES

 Percent of bachelor's graduates continuing education or employed (\$30,000+), one-year out

FACULTY & RESEARCH STAFF

- Percent of Tenured/ Tenure track faculty
- Number of postdoctoral appointees

RESEARCH EXPENDITURES & ECONOMIC IMPACT

- Total R&D expenditures (\$M)
- Federal R&D expenditures (\$M)

IMPACT OF RESEARCH & SCHOLARSHIP

- Number of faculty awards
- Normalized citation impact

LOCAL & COMMUNITY ENGAGEMENT

- Number of new corporate & community partnerships per year
- Number of continuous corporate & community partnerships per year

NATIONAL AND GLOBAL PARTNERSHIPS

- Number of new national and global partnerships per year Number of Fulbright Scholars and student research projects
- Percent of publications with international coauthors from outside USF
- Percent of publications with national coauthors from outside USF

PROFESSIONAL DIVERSITY & SUCCESS

- Increased diversity profile (diverse staff and faculty distribution)
- Employee satisfaction

STUDENT DIVERSITY & OUTCOMES

- Increased diversity profile (diverse undergraduate and graduate student enrollment)
- Graduation rates for Pell Students
- Graduation Rates for Male Students
- Graduation Rates for Female Students
- Graduation Rates for Non-White Students

TRANSPARENT & SUSTAINABLE BUDGET

Average spending per student

DIVERSIFICATION OF REVENUE STREAMS

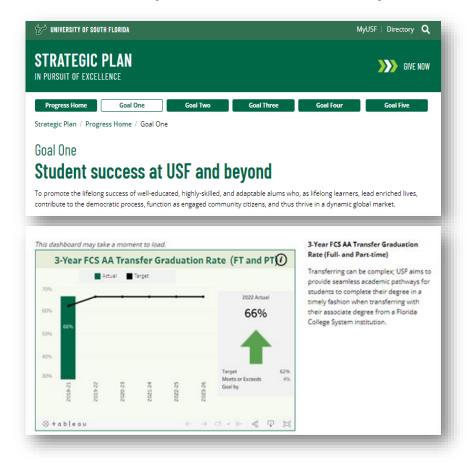
- Percent of USF revenue from the state compared to other revenue sources
- Endowment
- · Alumni Giving Rate

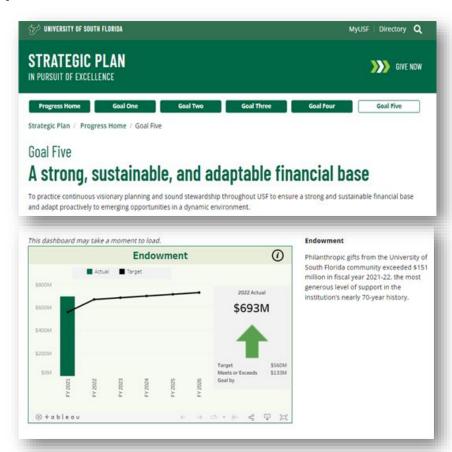
OPERATIONAL EFFICIENCY

 Average time to complete key processes vital to the mission of USF (e.g., hiring, MOU approval, research contract approval, etc.)

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Scorecard (Phase 1 Metrics) – Sample Screenshots





Moving Forward

- Regular updates to the USF BOT Strategic Initiatives Committee
 - Guidance and discussion
 - Scorecard updates in alignment with annual *Accountability Planning* processes & approvals
- Integrated, ongoing, planning and execution across the USF enterprise





IN PURSUIT OF EXCELLENCE



USF Strategic Plan 2022-2027

STRATEGIES FOR IMPLEMENTATION



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EXECUTIVE SUMMARY

The USF 2022-2027 Strategic Plan *In Pursuit of Excellence* was approved by the USF Board of Trustees on December 7, 2021 and was subsequently unanimously ratified by the Board of Governors on January 26, 2022. Immediately following the BOG approval of our Strategic Plan, President Rhea Law constituted and charged the Strategic Plan Implementation Advisory Committee (Appendix A) on February 3, 2022 to develop a plan to implement our Strategic Plan. The aim was to involve key stakeholders across USF to shape an implementation plan that was based on unit-level strategies while being consistent with the approved Strategic Plan. An equally important objective was to provide a focused approach to implementation by distilling the 131 metrics identified to track success of the Strategic Plan to a more condensed subset.

The co-Chairs of the Implementation Advisory Committee worked with members to identify a subset of potential primary metrics, with the rest serving as supporting metrics. These 48 primary metrics were identified based on analysis of a survey of Committee members regarding the relative importance of specific metrics along with consideration of USF's institutional aspirations related to Performance Based Funding (PBF), Preeminence (PE), Top-25 ranking, Key Performance Indicators (KPI) for our Performance, Planning and Accountability (PPA) to the BOG, and AAU aspirations. In addition to a condensed set of metrics, this analysis revealed functional groupings of these metrics, or themes, for each of the 5 goals of the Strategic Plan. These themes provide a powerful connection linking strategies for implementation to associated metrics for tracking progress.

The university community was engaged extensively in developing an operational plan built on unit-level strategies and tactics reflective of their aspirations. This was achieved by gathering feedback through a 35-member Planning Officers Committee (Appendix B) constituted on February 25, 2022. This Committee representing Planning Officers from each of our administrative and academic units across all campuses of USF including USF Health was based on recommendations from respective unit supervisors. The co-Chairs met with the Planning Officers Committee on a weekly basis to orient the Committee, define the task and provide available data and information to facilitate their work. A fillable PDF form was developed to provide ease of navigation for the Planning Officers throughout our entire Strategic Plan with flexible avenues to provide unit-level strategies and tactics. By May 13, 2022 we received over 150 pages of input from all Planning Officers. These cumulative unit-level strategies were then condensed to overall institutional strategies (hereafter referred to as strategies) aligned with associated primary metrics, organized by the 13 identified themes for all 5 goals of the Strategic Plan.

This document presents the resultant condensed plan with an introductory listing of Strategic Plan goals and themes followed by overarching strategies aligned with associated primary metrics for each theme by goal. Potential responsible/co-responsible parties for each identified strategy are included in Appendix C. Responsible/co-responsible parties are those who are identified in the Strategic Plan as accountable/co-accountable officers for metrics that will be affected by each proposed strategy.

It is anticipated that these strategies will guide the initial implementation of our Strategic Plan commencing on July 1, 2022, and provide a basis for further refinement and budgetary alignment in subsequent years. A more detailed description linking the strategies to specific unit-level strategies and tactics is available in "*In Pursuit of Excellence*: USF Strategic Plan 2022-2027- Strategies and Tactics for Implementation".

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THEMES IDENTIFIED FOR STRATEGIC PLAN GOALS

(Themes bulleted below each Goal)

GOAL 1: Student success at USF and beyond

To promote the success of well-educated, highly skilled, and adaptable alums who, as lifelong learners, lead enriched lives, contribute to the democratic process, function as engaged community citizens, and thus thrive in a dynamic global market.

- » REPUTATION & STUDENT CALIBER
- » PROGRESSION & COMPLETION
- » CAREER OUTCOMES

GOAL 2: Faculty excellence in research and innovation

To conduct high-impact research and innovation to advance frontiers of knowledge, solve global problems, and improve lives.

- » FACULTY & RESEARCH STAFF
- » RESEARCH EXPENDITURES & ECONOMIC IMPACT
- » IMPACT OF RESEARCH & SCHOLARSHIP

GOAL 3: Partnerships and engagement with local, national, and global impact

To be a major social and economic engine creating robust global, national, and regional partnerships to build a prosperous and sustainable future for our regional communities and the state of Florida.

- » LOCAL & COMMUNITY ENGAGEMENT
- » NATIONAL & GLOBAL PARTNERSHIPS

GOAL 4: A great place to work, learn, and discover for a diverse and inclusive USF community

To provide a safe, inclusive, and vibrant community for learning, discovery, creative activities, and transformative experiences enabled through adaptive design of physical, social, and digital environments.

- » PROFESSIONAL DIVERSITY & SUCCESS
- » STUDENT DIVERSITY & OUTCOMES

GOAL 5: A strong, sustainable, and adaptable financial base

To practice continuous visionary planning and sound stewardship throughout USF to ensure a strong and sustainable financial base and adapt proactively to emerging opportunities in a dynamic environment.

- » TRANSPARENT & SUSTAINABLE BUDGET
- » DIVERSIFICATION OF REVENUE STREAMS
- » OPERATIONAL EFFICIENCY

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STRATEGIES AND ASSOCIATED METRICS

Goal 1: Student Success at USF and Beyond

(Strategies in Gold Boxes and Primary Metrics in Teal Boxes under Themes)

REPUTATION & STUDENT CALIBER

- 1. Strengthen the caliber of incoming students
- 2. Enhance the excellence of faculty and staff through robust recruitment and development
- 3. Enhance institutional ranking and reputation

- Average GPA (Incoming)
- Student-to-faculty ratio
- Number of public university national rankings in the top 50
- Average SAT scores

PROGRESSION & COMPLETION

- 4. Develop institutional infrastructure to support the incorporation of High-Impact Practices (HIPs) into the curriculum
- 5. Expand study abroad opportunities through college-led and affiliate programs and enhanced scholarships
- 6. Institutionalize broad-based undergraduate research opportunities
- 7. Provide enhanced opportunities for community-engaged learning
- 8. Provide infrastructure to maximize student learning
- 9. Recognize and promote pedagogical excellence through annual evaluations and awards
- 10. Use data analytics and internal processes to support student success and faculty success
- 11. Provide and promote student engagement through stimulating campus and off-campus co-curricular activities
- 12. Enhance access to physical and mental health services for student well-being
- 13. Align advising and internal communication to foster student engagement
- 14. Strengthen student persistence and graduation outcomes

- FTIC Retention Rate
- Class size < 20
- 6-Year FTIC graduation rate (Full- and Part-Time)
- 3-Year FCS AA Transfer graduation rate (Full-Time and Part-time)
- 4-Year FTIC graduation rate (Full-time)
- Percent of Bachelor graduates completing High-Impact Practices (HIPs) (multiple underlying metrics)

CAREER OUTCOMES

- 15. Provide resources to address student progression in high-demand areas
- 16. Stimulate advisory councils and strengthen student engagement with business and community
- 17. Align department activities and curricular offerings with connections that enhance student career prospects
- 18. Use data-driven approaches to enhance student recruitment and employment prospects
- 19. Develop enhanced student advancement, career services and graduate placement
- Percent of bachelor's graduates continuing education or employed (\$30,000+), one-year out
- Median wages of bachelor's graduates employed full-time, one-year out

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Goal 2: Faculty Excellence in Research and Innovation

(Strategies in Gold Boxes and Primary Metrics in Teal Boxes under Themes)

FACULTY & RESEARCH STAFF

- 1. Increase postdoctoral appointees
- 2. Target recruitment and development to enhance research and innovation
- Percent of Tenured/ Tenure track faculty
- Number of postdoctoral appointees

RESEARCH EXPENDITURES & ECONOMIC IMPACT

- 3. Improve effectiveness, speed and transparency of sponsored research processes and systems
- 4. Increase research infrastructure and capacity
- 5. Enhance support for submission and administration of competitive grant proposals
- 6. Establish and promote collaborative research with local, national, and global partners, and enhance revenue generation in strategic areas of research expertise
- 7. Foster an environment conducive to enhance research and innovation
- 8. Develop strategic research clusters at USF focused on emerging areas of significance
- 9. Strengthen internal support structures and procedures to facilitate transdisciplinary research

- Total R&D expenditures (\$M)
- Federal R&D expenditures (\$M)
- Economic impact of research funding (all sources) (\$M)

IMPACT OF RESEARCH & SCHOLARSHIP

- 10. Increase the visibility of scholarship and support scholars at USF
- 11. Increase the impact of USF's research and scholarship
- 12. Elevate quality and quantity of peer- reviewed publications & scholarly work
- 13. Enhance prestigious faculty awards and national recognition
- 14. Elevate programs to top quartile of their disciplinary field
- 15. Increase collaborations and publications with faculty/students between colleges
- 16. Increase economic impact of USF's research and scholarship

- Number of publications, citations, and creative work through collaborations
- Number of faculty awards
- Normalized citation impact

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Goal 3: Partnerships and Engagement with Local, National, and Global Impact

(Strategies in Gold Boxes and Primary Metrics in Teal Boxes under Themes)

LOCAL & COMMUNITY ENGAGEMENT

- 1. Strengthen corporate and community partnerships building on the synergistic strengths of each of USF's communities
- 2. Maintain and expand community professional training and continuing education programs
- 3. Address community healthcare through expanded partnerships and programs
- 4. Strengthen collaborations with pre-k-12 school systems on all USF campuses
- 5. Expand partnerships with businesses, non-profit organizations, and government agencies
- 6. Create new pathways and strengthen continuing education programs for lifelong learning and upskilling & reskilling of postgraduates

- Number of partnerships with local businesses
- Number of interactions with PreK-12 school systems
- Number of new and continuous corporate & community partnerships per year
- Enrollment in and number of professional training and continuing education courses offered to the community
- Maintain Carnegie Foundation's Community Engagement Classification

NATIONAL & GLOBAL PARTNERSHIPS

- 7. Strengthen USF's inventory of intellectual property through patents and incentivize licensing
- 8. Enhance the creation of start-up companies to commercialize and monetize USF's intellectual property
- 9. Strengthen existing national partnerships and leverage institutional expertise to engage new national partners
- 10. Strengthen global partnerships and establish more collaborative research opportunities with major global universities
- 11. Expand national and international academic transfer / articulation agreements
- 12. Improve awareness of and support for pursuing Fulbright opportunities for both students and faculty
- 13. Expand pathways for enhanced student experiences through exposure to global opportunities
- 14. Increase support and identify effective strategies to enhance collaborative national & international scholarships
- 15. Increase the diversity and number of international students at USF

- Number of new national and global partnerships per year (consolidation of two metrics)
- Number of Fulbright Scholars and student research projects
- Number of publications with international and national coauthors from outside USF

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Goal 4: A Great Place to Work, Learn, and Discover for a Diverse and Inclusive USF Community

(Strategies in Gold Boxes and Primary Metrics in Teal Boxes under Themes)

PROFESSIONAL DIVERSITY & SUCCESS

- Strengthen existing and explore new opportunities for community engagement specially in diverse communities that have been historically overlooked
- 2. Develop and implement a proactive approach to recruit and retain diverse faculty and staff
- 3. Expand workshops, certificates and learning opportunities for faculty and staff to promote inclusivity, equity, critical thinking, and diversity of thought
- 4. Promote access and success for diverse populations by developing advanced physical and digital infrastructures on all USF campuses
- 5. Proactively ensure positive employee experiences through enhancements in onboarding, equitable compensation, professional development, and engagement
- 6. Foster a collaborative university community through shared activities

- Increased diversity profile (diverse staff and faculty distribution)
- Staff retention rates
- Faculty retention rates
- Employee satisfaction

STUDENT DIVERSITY & OUTCOMES

- 7. Expand pipelines and pathways to enhance diverse student enrollment and graduation
- 8. Develop curricula and programming through enhanced general education courses to address diverse perspectives
- Promote access and success for diverse student populations by developing advanced physical and digital infrastructures for teaching and research
- Increased diversity profile (diverse undergraduate and graduate student enrollment)
- Undergraduate Pell student enrollment
- Graduation rates for diverse populations (multiple underlying metrics)
- Bachelor's degrees awarded to diverse populations
- Bachelor's degrees awarded to African American & Hispanic students
- Master's (Graduate) degrees awarded to diverse populations
- Doctoral degrees awarded to diverse populations
- Graduation rate for Pell students (6-year FTIC)

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Goal 5: A Strong, Sustainable, and Adaptable Financial Base

(Strategies in Gold Boxes and Primary Metrics in Teal Boxes under Themes)

TRANSPARENT & SUSTAINABLE BUDGET

- 1. Implement a transparent and predictable university-wide budget model including all administrative & academic units aligned with the strategic plan
- 2. Continuously improve annual budget model and processes based on systematic feedback from units
- 3. Build a strong and sustainable financial base through enhanced legislative, community, and alumni connections
- 4. Ensure alignment of revenues with specified strategic goals

- Implementation of a transparent and predictable budget model
- Average spending per student
- Average spending on people (e.g., faculty and staff salaries, benefits, professional development) and operations (e.g., research, facilities, information technology)

DIVERSIFICATION OF REVENUE STREAMS

- 5. Strengthen current alumni engagement and increase alumni giving rate
- 6. Build multiple robust pipelines to generate diverse revenue streams for financial success of the university
- Percent of USF revenue from the state compared to other revenue sources
- Endowment
- Revenue from philanthropy
- Alumni Giving Rate

OPERATIONAL EFFICIENCY

- 7. Strengthen the university's proactive diverse supplier business strategy
- 8. Optimize the implementation of investments and maximization of university assets
- 9. Evaluate key university processes to minimize time and cost for optimal efficiency
- Streamline university business processes and enhance the teaching & learning experiences through an integration of technology solutions, process improvements and digitization
- Average time to complete key processes vital to the mission of USF (e.g., hiring, MOU approval, research contract approval, etc.): Efficiency metric

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APPENDIX A: STRATEGIC PLAN IMPLEMENTATION ADVISORY COMMITTEE

- Dr. Theresa Chisolm, Co-chair; Vice Provost for Strategic Planning, Performance and Accountability
- **Dr. Pritish Mukherjee**, Co-chair; Vice Provost and Associate Vice President Strategic Talent Recruitment, University Reputation, and Impact; Professor of Physics
- Ms. Jessica Burgess, President, Administrative Advisory Council
- Ms. Moniquie Brown, President, USF Staff Senate
- Mx. Willow Craine, Graduate and Professional Student Council Vice President
- Dr. Andrea Ellis, American Council on Education Fellow
- Dr. Valeria Garcia, Associate Vice President of Decision Support
- Ms. Paige Geers, Acting Chief of Staff
- Dr. Moez Limayem, Lynn Pippenger Dean, Muma College of Business
- Dr. Usha Menon, Senior Associate Vice President, USF Health; Dean, College of Nursing
- Dr. Alexis Mootoo, Assistant Vice President, Resource Management & Development, Student Success
- Dr. Zacharias Pieri, Associate Professor of International Relations and Security Studies, College of Arts and Sciences
- Dr. Anthony Rolle, Dean, College of Education
- **Dr. Charles Stanish**, Professor of Anthropology, College of Arts and Sciences; Executive Director, Institute for the Advanced Study of Culture and the Environment
- Mr. Richard Sobieray, Senior Associate Vice President and Chief Financial Officer for USF Health, Vice Dean of Business and Finance for Morsani College of Medicine
- Dr. Melanie Riedinger-Whitmore, Professor, Department of Integrative Biology, College of Arts and Sciences
- Dr. Stephen Stark, Professor and Chair, Department of Psychology College of Arts and Sciences
- Ms. Ilana Thomsett, Academic Services Administrator
- Ms. Tanya Vomacka, Director of Strategic Communications and Engagement
- Ms. Jillian Wilson, Student Body Vice President

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APPENDIX B: PLANNING OFFICERS COMMITTEE

Co-Chairs: Dr. Pritish Mukherjee and Dr. Theresa Chisolm

Execut	IVA 🔊	Arvi	CAC
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Audit	Ms. Kate Head
Campus and University Executive Offices	Dr. Michelle Madden, Dr. Brett Kemker, Ms. Paige Geers
Compliance and Ethics	Mr. Terry Nealy
Diversity, Equity, and Inclusion	Dr. Elizabeth Hordge-Freeman
General Counsel	Ms. Brittany Dix

Academic Affairs Colleges and USF Libraries

College of the Arts	Dr. Karen Frank
College of Arts and Sciences	
(Schools of Social Sciences, Humanities,	Ms. Erin Sutliff, Dr. Brian Connolly, Ms. Erin Jensen
and Natural Sciences and Mathematics)	
College of Behavioral & Community Sciences	Ms. Patricia Cleveland
Muma College of Business	Dr. Gert-Jan de Vreede
College of Education	Dr. Kathy Bradley-Klug
College of Engineering	Dr. Sanjukta Bhanja
Patel College of Global Sustainability	Dr. Joseph Dorsey
Judy Genshaft Honors College	Dr. Benjamin Young
College of Marine Science	Dr. Gary Mitchum
USF Libraries	Mr. Terry Hutchings

Administrative and Support Units

Administrative Services	Ms. Jennifer Fleischman
Advancement & Alumni Affairs	Ms. Pam Prado
Business and Finance	Ms. Jennifer Condon
Communications and Marketing	Mr. Adam Freeman
Graduate Studies	Dr. Ruth Bahr
Human Resources	Ms. Angie Sklenka and Ms. Sheri Neshiem
Information Technology	Ms. Carrie Purol
Innovative Education	Ms. Stephanie Harff
Office of Decision Support	Dr. Valeria Garcia
Athletics	Ms. Kris Pierce
Provost's Office	Dr. Pritish Mukherjee
Research and Innovation	Dr. Michael Bloom
Student Success	Dr. Carmen Goldsmith
USF Health/Colleges	Dr. Jacqueleen Reyes Hull
USF World	Dr. Kiki Caruson

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APPENDIX C: RESPONSIBLE AND CO-RESPONSIBLE PARTIES

	1 - Responsible and Co-Responsible Parties	
1.	Strategies Strengthen the caliber of incoming students	Responsible Parties / co-Responsible Parties VP Student Success
2.	Enhance the excellence of faculty and staff through robust recruitment and development	Provost, VP Research, VP Student Success, Deans, VP Communications & Marketing, SVP USF Health
3.	Enhance institutional ranking and reputation	Provost , Deans, VP Communications & Marketing, SVP USF Health
4.	Develop institutional infrastructure to support the incorporation of High-Impact Practices (HIPs) into the curriculum	Provost, VP USF World , VP Student Success, Deans, SVP USF Health
5.	Expand study abroad opportunities through college-led and affiliate programs and enhanced scholarships	Provost, VP USF World, VP Student Success, Deans
6.	Institutionalize broad-based undergraduate research opportunities	Provost, VP USF World, VP Student Success, Deans
7.	Provide enhanced opportunities for community-engaged learning	Provost, VP USF World, VP Student Success, Deans
8.	Provide infrastructure to maximize student learning	Provost, Deans, SVP USF Health
9.	Recognize and promote pedagogical excellence through annual evaluations and awards	VP Student Success, Provost, Deans, SVP USF Health
10.	Use data analytics and internal processes to support student success and faculty success	VP Student Success, VP Research, Provost, Deans, VP Communications & Marketing, SVP USF Health
11.	Provide and promote student engagement through stimulating campus and off-campus co-curricular activities	VP Student Success, Deans, VP Athletics
12.	Enhance access to physical and mental health services for student well-being	VP Student Success, Deans, VP Athletics
13.	Align advising and internal communication to foster student engagement	VP Student Success, Deans, VP Athletics
14.	Strengthen student persistence and graduation outcomes	VP Student Success, Provost, Deans, SVP USF Health
15.	Provide resources to address student progression in high- demand areas	VP Student Success, Provost, Deans, SVP USF Health
16.	Stimulate advisory councils and strengthen student engagement with business and community	VP USF World, Provost, VP Student Success , Deans, SVP USF Health
17.	Align department activities and curricular offerings with connections that enhance student career prospects	VP USF World, Provost , VP Student Success, SVP USF Health, Deans
18.	Use data-driven approaches to enhance student recruitment and employment prospects	VP Student Success, Provost, Deans, SVP USF Health
19.	Develop enhanced student advancement, career services and graduate placement	Provost, VP Research, VP Student Success, Deans, VP Communications & Marketing, SVP USF Health

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Enhance support for submission and administration of

Develop strategic research clusters at USF focused on

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VP Research, Deans

VP Research, Provost, Deans, SVP USF Health

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Goal 2 - Responsible and Co-Responsible Parties Identified By Strategy		
	Strategies	Responsible Parties / co-Responsible Parties
1.	Increase postdoctoral appointees	Provost, Deans, SVP USF Health, VP Research
2.	Target recruitment and development to enhance research and innovation	VP Research, Provost, Deans, SVP USF Health
3.	Improve effectiveness, speed and transparency of sponsored research processes and systems	VP Research, Provost, Deans, SVP USF Health
4.	Increase research infrastructure and capacity	VP Research, Provost, Deans, SVP USF Health

generation in strategic areas of research expertise	
7. Foster an environment conducive to enhance research and innovation	VP Research, Provost, Deans, SVP USF Health

	emerging areas of significance	
9.	Strengthen internal support structures and procedures to	VP Research, Provost , Deans
	facilitate transdisciplinary research	

	USF	Communications & Marketing
11.	Increase the impact of USF's research and scholarship	VP Research, Provost , Deans, SVP USF Health, VP Communications & Marketing
12	Flevate quality and quantity of neer- reviewed publications &	VP Research Provest Deans SVP IISE Health VP

Increase the visibility of scholarship and support scholars at | **VP Research, Provost**, Deans, SVP USF Health, VP

	scholarly work	Communications & Marketing
13.	Enhance prestigious faculty awards and national recognition	VP Research, Provost, Deans, SVP USF Health
14.	Elevate programs to top quartile of their disciplinary field	Provost, Deans, SVP USF Health
15.	Increase collaborations and publications with faculty/	VP Research , Provost, Deans, SVP USF Health

	students between colleges	
16.	Increase economic impact of USF's research and	VP Research, Provost, Deans, SVP USF Health, VP
	scholarship	Communications & Marketing

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Goal 3 - Responsible and Co-Respons	sible Parties Identified By Strategy
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	Strategies	Responsible Parties / co-Responsible Parties
1.	Strengthen corporate and community partnerships building on the synergistic strengths of each of USF's communities	SVP Advancement & Alumni Affairs (OCP), Provost, VP Research, Deans, Regional Chancellors, SVP USF Health, VP Student Success, VP USF World
2.	Maintain and expand community professional training and continuing education programs	Provost, VP Research, Deans
3.	Address community healthcare through expanded partnerships and programs	SVP USF Health, Dean (Muma College of Business), Deans
4.	Strengthen collaborations with pre-k-12 school systems on all USF campuses	Dean (College of Education), Dean (Muma College of Business), Deans
5.	Expand partnerships with businesses, non-profit organizations, and government agencies	Dean (Muma College of Business), Deans
6.	Create new pathways and strengthen continuing education programs for lifelong learning and upskilling & reskilling of postgraduates	AVP Innovative Education, Deans
7.	Strengthen USF's inventory of intellectual property through patents and incentivize licensing	VP Research, Deans
8.	Enhance the creation of start-up companies to commercialize and monetize USF's intellectual property	VP Research, Deans
9.	Strengthen existing national partnerships and leverage institutional expertise to engage new national partners	SVP Advancement & Alumni Affairs (OCP), VP Research, Provost, VP Student Success, Deans, VP USF World
10.	Strengthen global partnerships and establish more collaborative research opportunities with major global universities	SVP Advancement & Alumni Affairs (OCP), Provost, VP Research, VP USF World, VP Student Success
11.	Expand national and international academic transfer / articulation agreements	Provost, VP USF World , Deans, VP Student Success, VP Institutional Equity
12.	Improve awareness of and support for pursuing Fulbright opportunities for both students and faculty	VP USF World, Deans
13.	Expand pathways for enhanced student experiences through exposure to global opportunities	VP USF World, Deans, VP Institutional Equity, VP Student Success
14.	Increase support and identify effective strategies to enhance collaborative national & international scholarships	VP USF World, Provost , Deans, VP Institutional Equity, VP Student Success
15.	Increase the diversity and number of international students at USF	VP USF World, Provost, Deans, VP Student Success

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Goal 4 - Responsible and Co-Responsible Parties Identified By Strategy

	Strategies	Responsible Parties / co-Responsible Parties
1.	Strengthen existing and explore new opportunities for community engagement specially in diverse communities that have been historically overlooked	VP Student Success, Deans
2.	Develop and implement a proactive approach to recruit and retain diverse faculty and staff	Provost, VP Human Resources , Deans, VP Institutional Equity, SVP USF Health
3.	Expand workshops, certificates and learning opportunities for faculty and staff to promote inclusivity, equity, critical thinking, and diversity of thought	Provost, Deans , VP Institutional Equity, SVP USF Health
4.	Promote access and success for diverse populations by developing advanced physical and digital infrastructures on all USF campuses	VP Institutional Equity, VP/CIO IT, Provost , SVP for Financial Strategy, SVP USF Health
5.	Proactively ensure positive employee experiences through enhancements in onboarding, equitable compensation, professional development, and engagement	VP Human Resources
6.	Foster a collaborative university community through shared activities	Provost , VP Athletics, VP Communications & Marketing
7.	Expand pipelines and pathways to enhance diverse student enrollment and graduation	VP Student Success, VP Institutional Equity, Deans
8.	Develop curricula and programming through enhanced general education courses to address diverse perspectives	VP Student Success, Provost , Deans, VP Institutional Equity, SVP USF Health
9.	Promote access and success for diverse student populations by developing advanced physical and digital infrastructures for teaching and research	VP Institutional Equity, VP/CIO IT, Provost , SVP for Financial Strategy, SVP USF Health

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Goal 5 - Responsible and Co-Responsible Parties Identified By Strategy

	Strategies	Responsible Parties / co-Responsible Parties
1.	Implement a transparent and predictable university-wide budget model including all administrative & academic units aligned with the strategic plan	SVP for Financial Strategy , Provost, Deans, SVP USF Health, VP Communications & Marketing
2.	Continuously improve annual budget model and processes based on systematic feedback from units	SVP for Financial Strategy , Provost, Deans, SVP USF Health, VP Communications & Marketing
3.	Build a strong and sustainable financial base through enhanced legislative, community, and alumni connections	Office of the President , SVP Advancement & Alumni Affairs, Regional Chancellors
4.	Ensure alignment of revenues with specified strategic goals	SVP for Financial Strategy , Provost, Deans, SVP USF Health
5.	Strengthen current alumni engagement and increase alumni giving rate	SVP Advancement & Alumni Affairs, Deans
6.	Build multiple robust pipelines to generate diverse revenue streams for financial success of the university	SVP for Financial Strategy, SVP Advancement & Alumni Affairs, VP Research, Provost, Deans, SVP USF Health
7.	Strengthen the university's proactive diverse supplier business strategy	SVP for Financial Strategy, Deans
8.	Optimize the implementation of investments and maximization of university assets	SVP for Financial Strategy
9.	Evaluate key university processes to minimize time and cost for optimal efficiency	SVP for Financial Strategy, VP/CIO IT, SVP USF Health, SVP Advancement & Alumni Affairs, VP Student Success, VP Research, VP Human Resources, VP USF World, VP Institutional Equity, VP Athletics, AVP Innovative Education
10.	Streamline university business processes and enhance the teaching & learning experiences through an integration of technology solutions, process improvements and digitization	VP/CIO IT, AVP Innovative Education

IN PURSUIT OF EXCELLENCE

USF Strategic Plan 2022-2027

STRATEGIES FOR IMPLEMENTATION

